SUPPLIERS
User Manual

IVALUA
buyer

CONTENTS

ONBOARDING SUPPLIERS

Introduction

Identifying potentially new suppliers is a critical process for a purchasing organization. This process can leverage new suppliers' expertise and add value to the organization.

SRM simplifies the management of supplier candidates and ensures supplier onboarding decisions are robust, collaborative, and transparent.

There are several ways to add suppliers to the IVALUA database:

- Import through a custom interface with an external supplier repository (requires coding)
- Supplier self-registration
- Creation by an internal user

Once the ETL interface is configured, importing suppliers is an automated process. So, this section will focus on the last two methods and describe both processes.

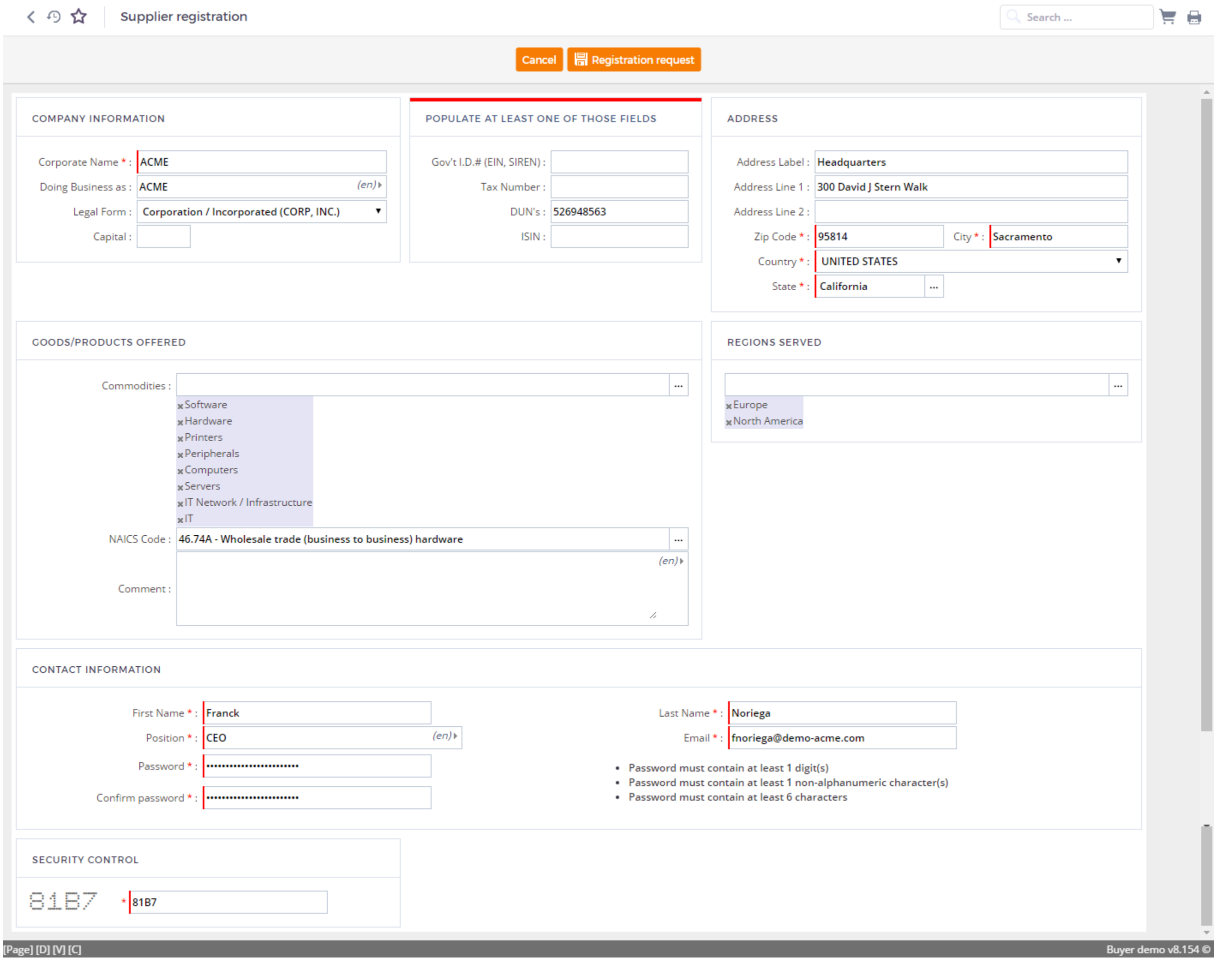
Supplier Self-Registration

The self-registration process generally begins with a communication from the purchasing department asking the supplier to click a hyperlink directing them to the IVALUA application homepage.

Self-registration can also be started from public RFPs published on the portal. These RFPs can be accessed by non-connected users who are required to self-register to participate. The process is similar.

Self-Registration Process

Once on the IVALUA application homepage, new suppliers can launch the self-registration process by clicking the **New Supplier? Register Now** button. This will display the supplier registration form.



In this form, suppliers are prompted to provide information about:

- Their company, including an ID number such as a government ID, tax ID, DUNS number, or ISN
- The goods and services they offer and the regions they serve
- A contact, who will be granted access to the application

When done completing the form, suppliers must key in the *captcha* code and submit their registration request. Their request is then acknowledged by a message.

Registration Approval Process

Overview

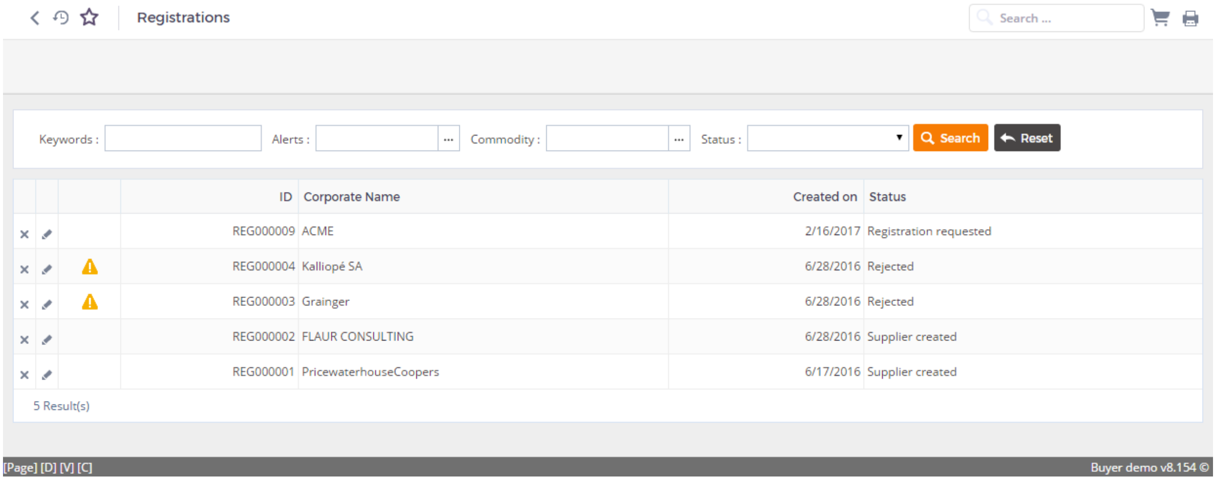
Once the registration is submitted, an approval process is followed. The approval process is a workflow routine that can be configured to meet your specific business process, and generally begins with a step to confirm whether the supplier already exists. This confirmation step can be automated such that the new supplier can be created or rejected based on predefined criteria.

For example, the workflow can determine whether a supplier with the same tax ID or same name already exists, and if so, reject the entry and send an informational email notifying the person registering. Note: In this section, we describe the approval workflow as it is currently configured in the out-of-the-box solution.

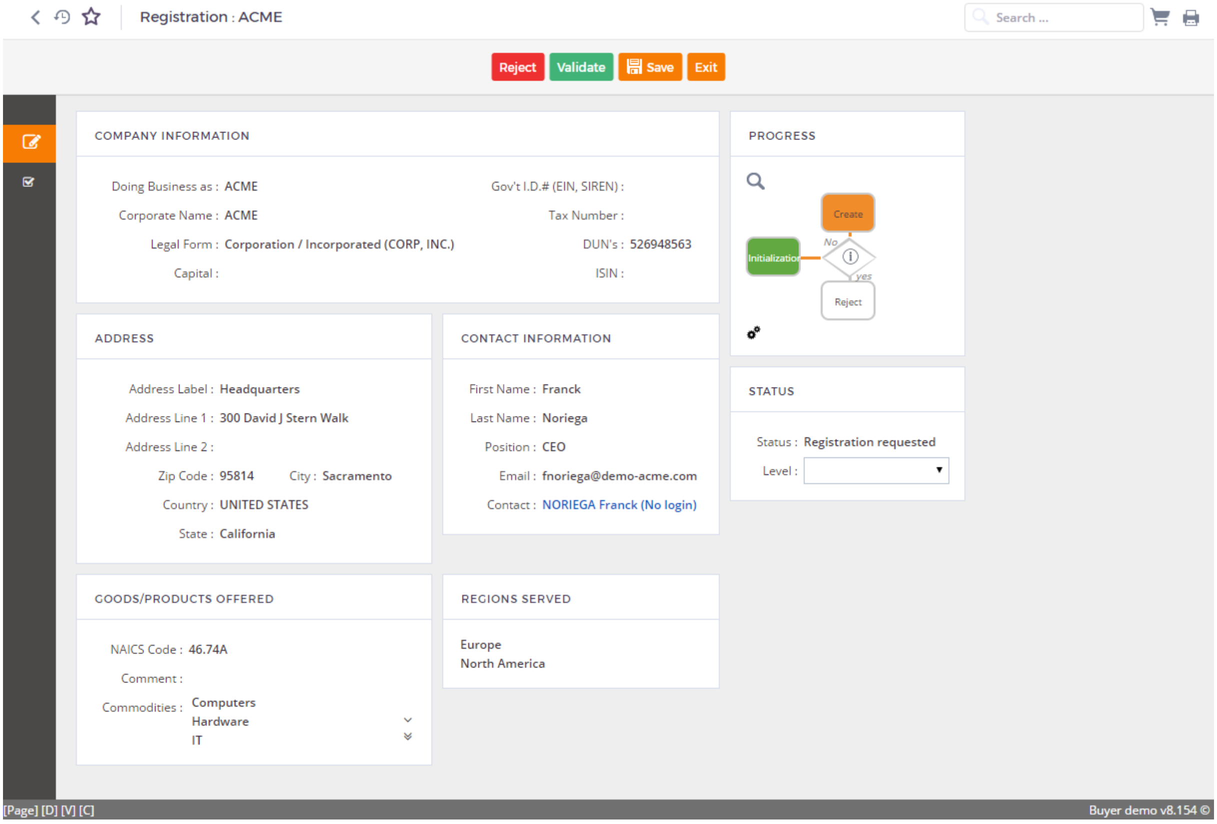
If the registration workflow determines that the new entry is not a duplicate, the supplier is added to the supplier database, and the new supplier record is ready to go through the supplier activation process.

Accessing and Processing Registration Requests on the Buyer's Side

Buyers can access submitted registration requests via the menu *Suppliers > Registrations*.



The registration request record shows the information posted by the supplier during the registration process.

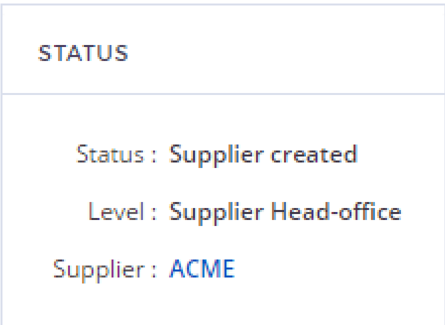


Review the data provided by the supplier. In particular, check whether the system has raised any alerts. Alerts can point to issues such as an already existing supplier ID (DUNS, ISIN, SIREN, Tax ID) or name, or contact on status 'Deleted' or 'Blocked' (these alerts are configurable and can be set to blocking or informational only). The overriding goal here is to ensure you do not create any duplicate supplier and that the person registering will be able to access the portal.

In the *Status* frame, you can assign a level to the supplier (if you don't, the level will automatically default to *Supplier Head-Office*).

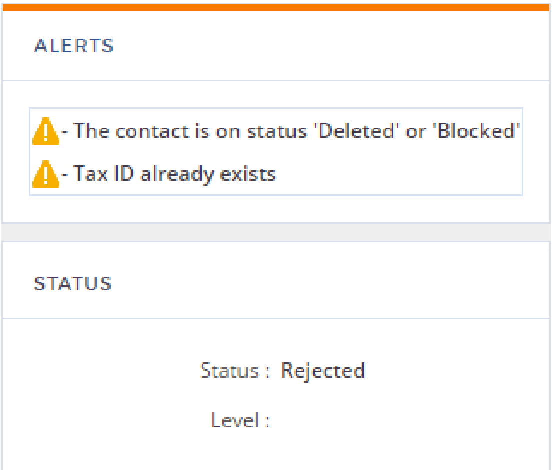
When done, you can either **validate** or **reject** the registration request:

- Upon validation, the supplier record is automatically created in the Supplier Base. In the registration form, the status of the request changes to *Supplier Created* and a new field appears with a link to the supplier record.

  This supplier now exists in the IVALUA Supplier Base but still requires an internal approval before being activated.

- Rejected requests do not have a link to the supplier record. Instead, they show the reasons why the registration wasn't successful in the *Alerts* frame.



Supplier Creation by Internal Users

Overview

An alternative route for feeding new suppliers into the Supplier Base is for internal users to create them directly in the repository.

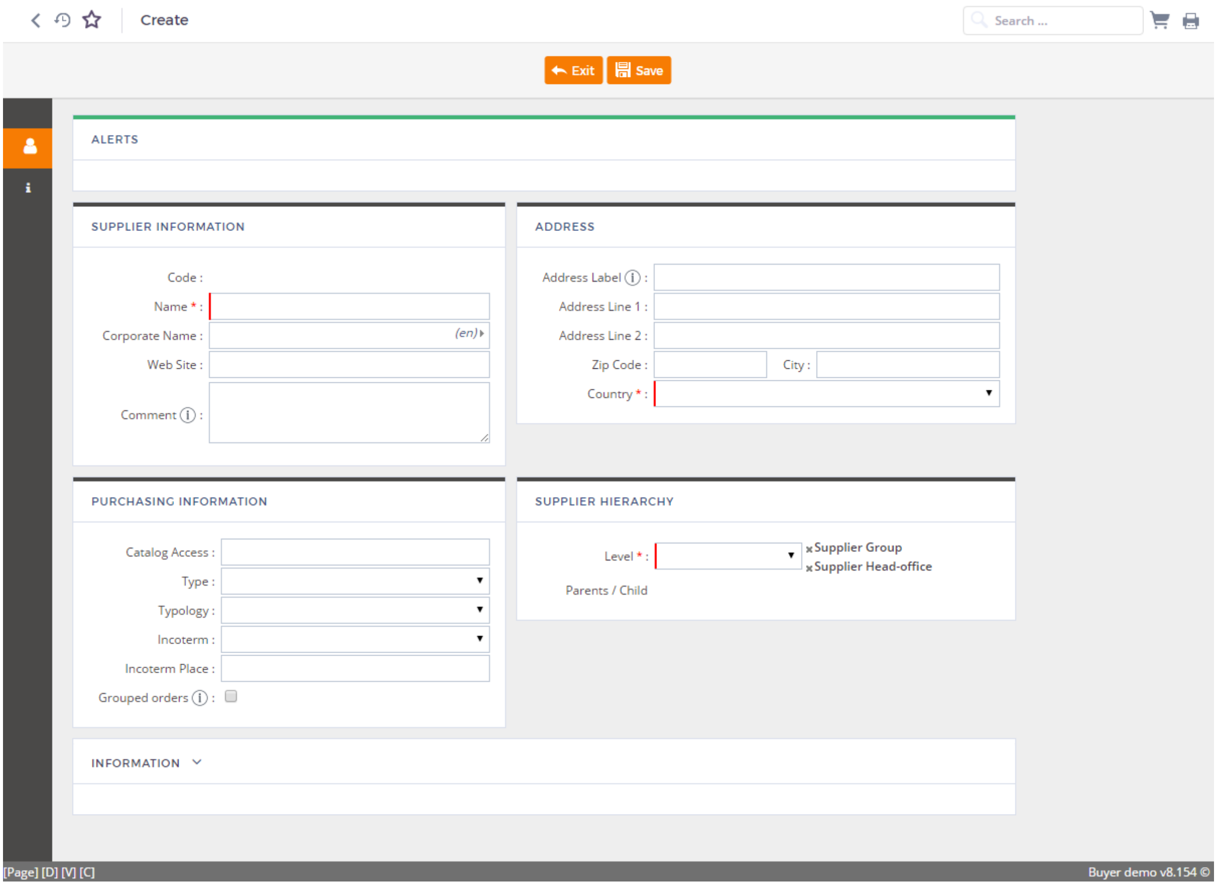
When you create a supplier record, you can, of course, populate it yourself if you have the information at hand. However, an even more time-efficient method would be to have it done at the source by calling on the supplier to do it for you. This method involves the following steps:

- Creating the record
- Adding the supplier contact who will populate the record
- Generating a login for the newly created contact
- Transferring the record creation activity to the supplier contact

Read on for step-by-step instructions on how to perform these steps.

Creating the Record

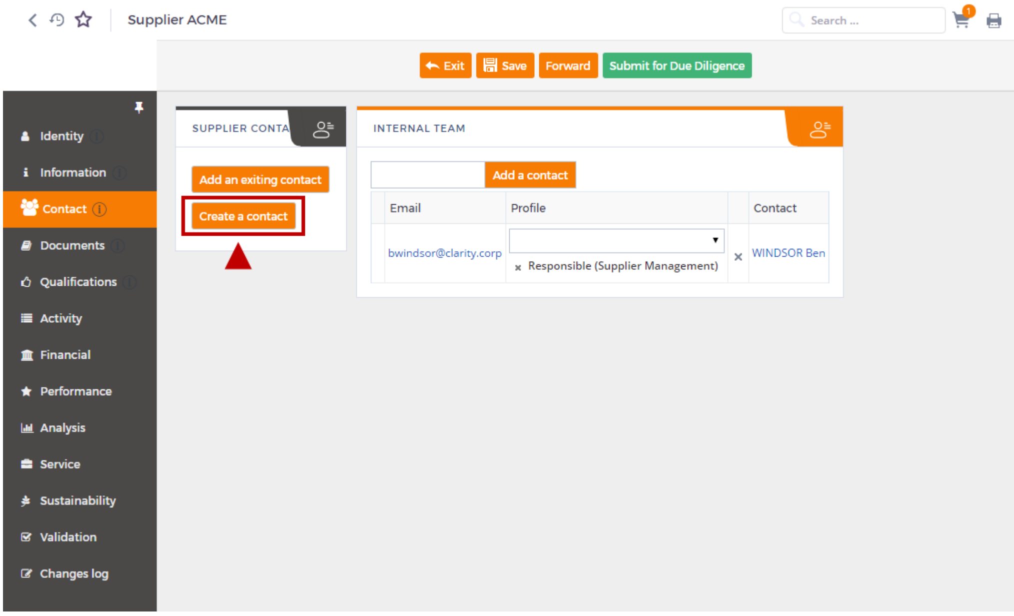
1. Go to Suppliers > (Browse Suppliers) Create.



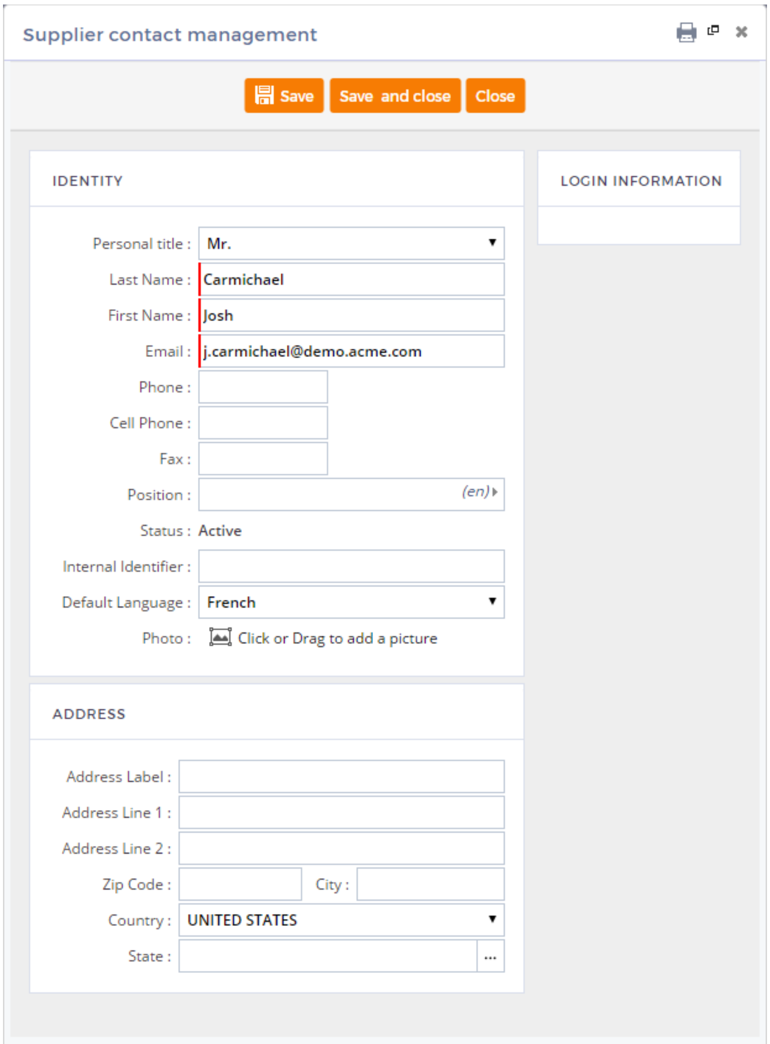
2. Input the name and country of the supplier (required fields).
3. Click **Save**.

Adding the Supplier Contact who Will Populate the Record

1. Display the *Contacts* tab and click the **Create a contact** button.

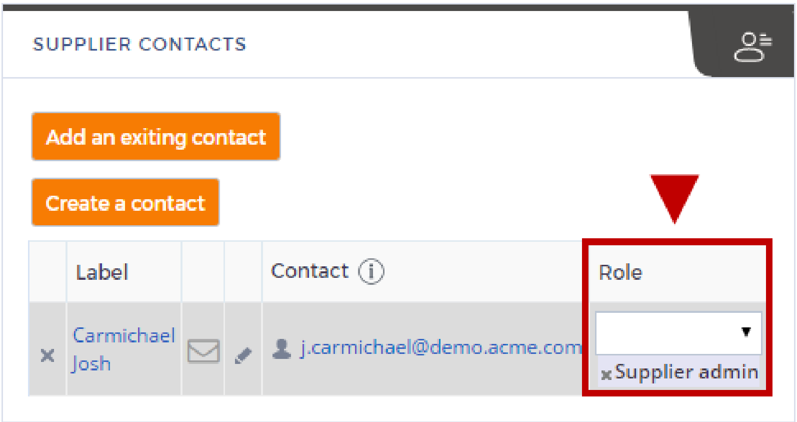


2. Fill in the required contact information and save.



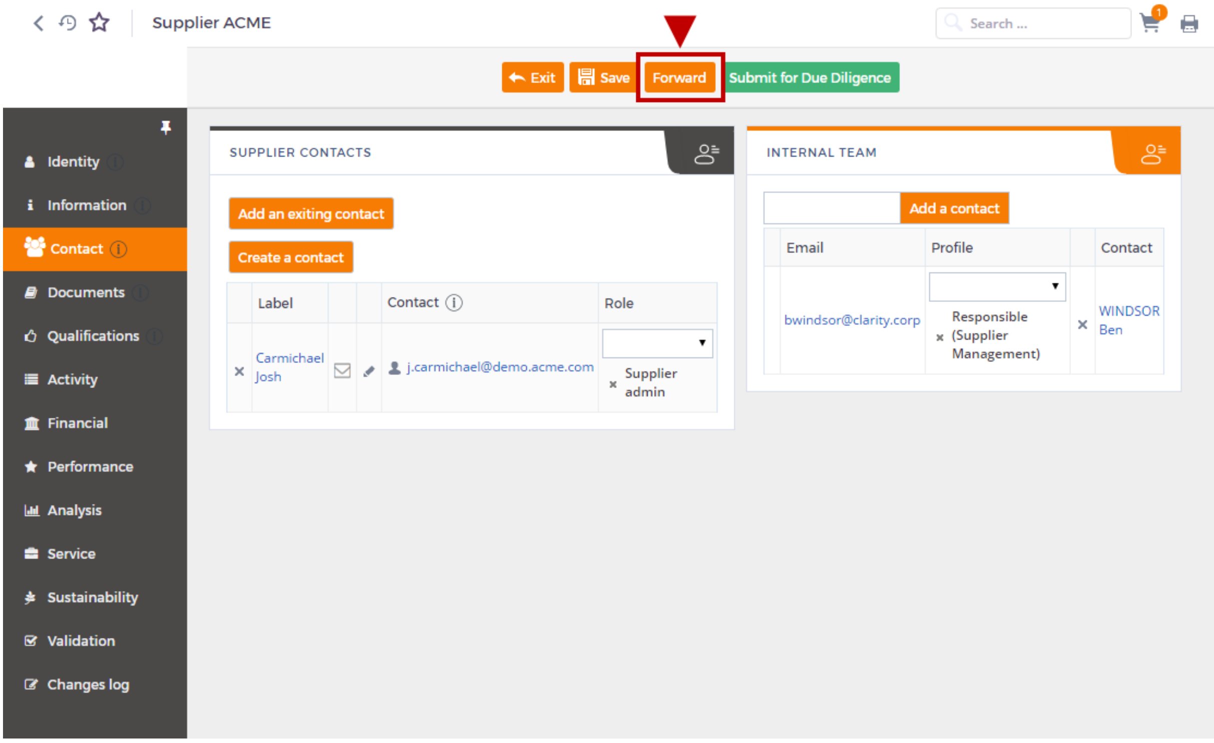
Generating Login Credentials for the Newly Created Contact

1. Click ✉. The *Invite a supplier contact to login* window is displayed.
2. If needed, you can customize the pre-populated message.
3. When satisfied with the message, click **Send invitation**. A message is displayed to confirm that the invitation has been successfully sent to the supplier contact. Close the window.
4. In the *Supplier contact management* window, click the **Save and close** button.
5. In the *Contacts* tab, assign a role to the contact and click **Save**.



Transferring the Record Creation Activity to the Supplier Contact

1. Click the **Forward** button.

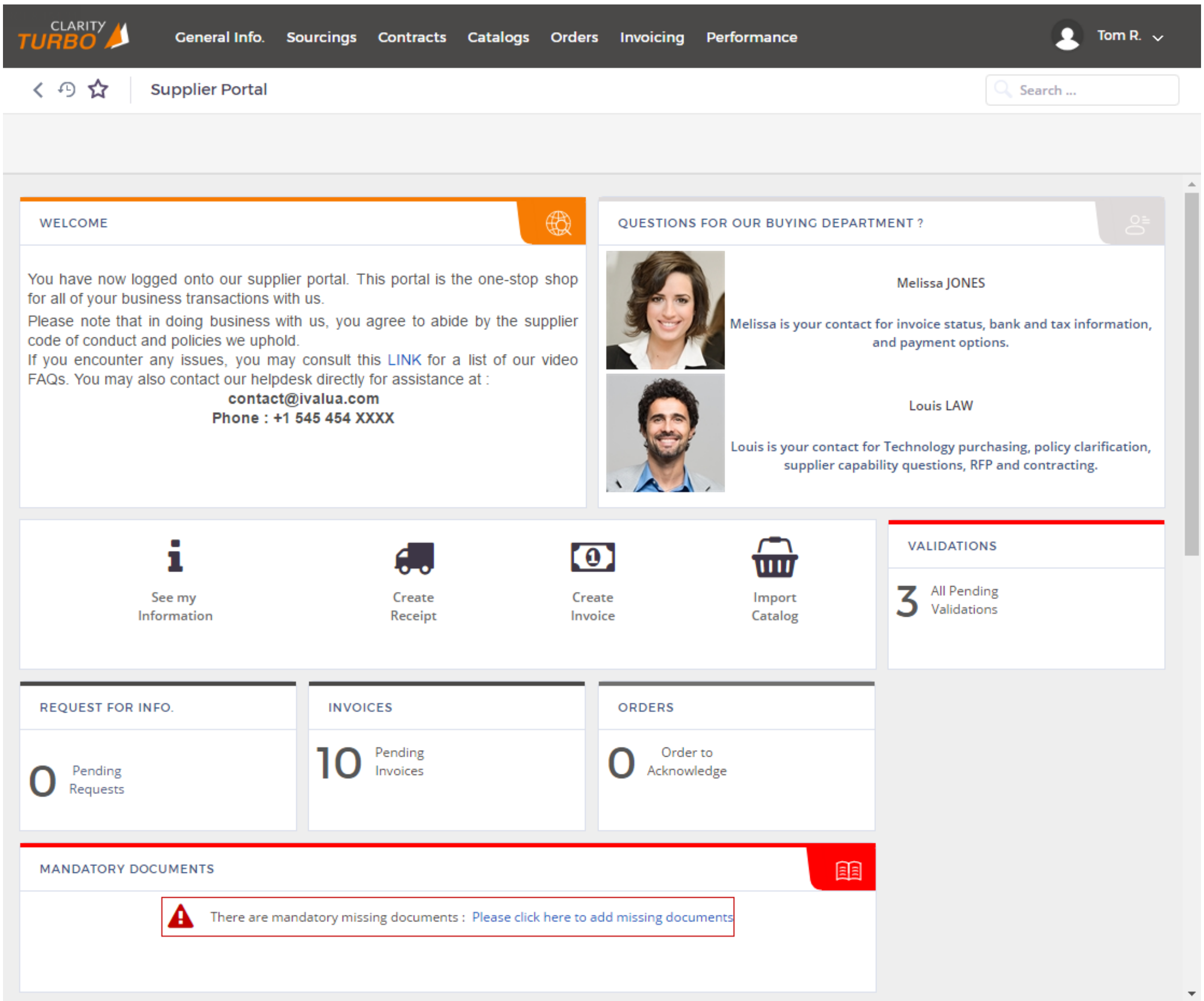


2. In the window that popups up, select the supplier contact's name and click **Save & close**.
3. Click **OK** in the confirmation message box.

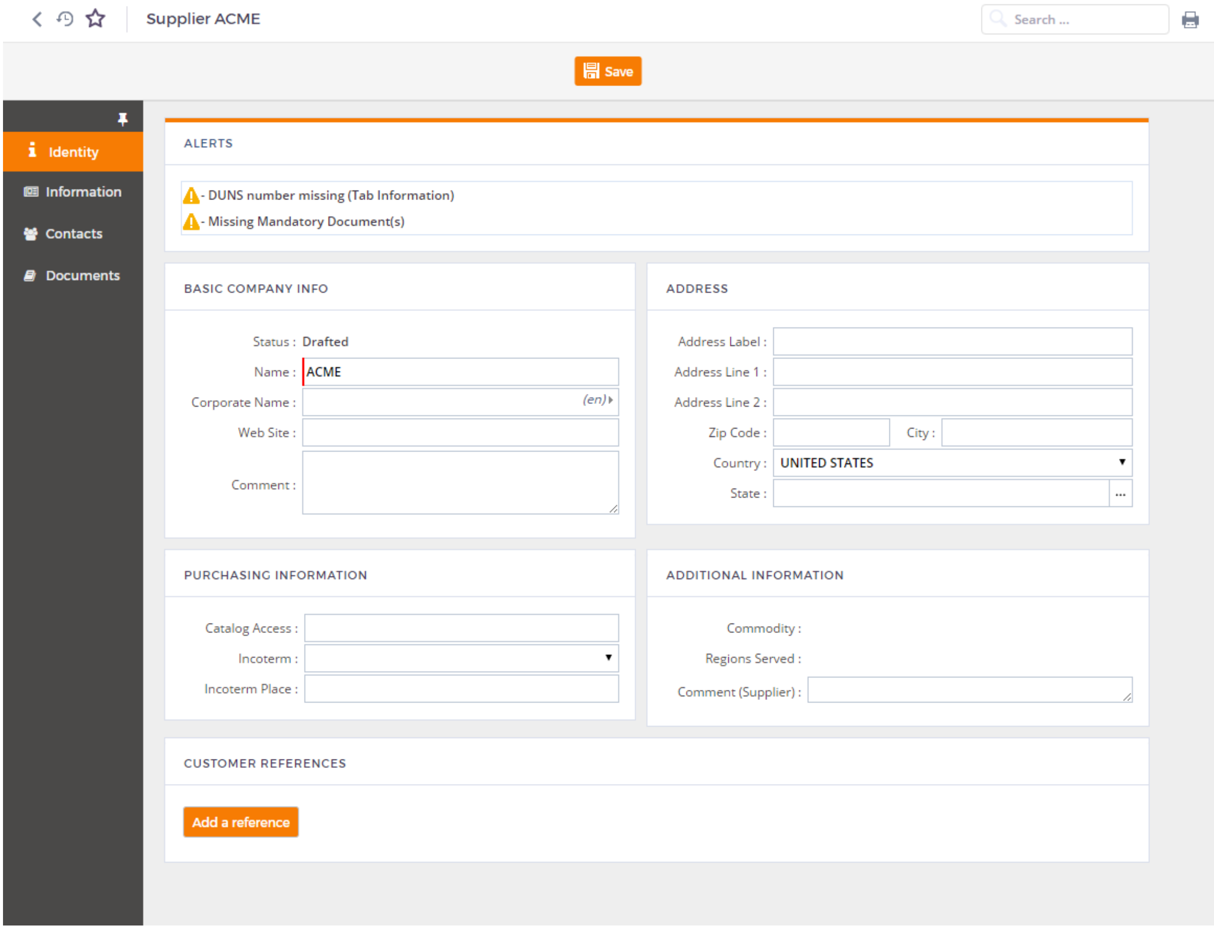
The supplier contact will be able to pick it up from there. They need to click the link provided in the notification email they will receive and login using the temporary password included in the email. They will be prompted to change their temporary password, and to read and accept the Terms & Conditions. After going through this process, they'll land on their homepage.

Note that when a supplier contact accesses the application, they'll use a dedicated portal. The Supplier Portal is a different access point than that for internal users.

The portal home page, like any other home page, can be configured by an Administrator. There is typically a welcome message with general information; user guides can also be posted to help users manage the application.



To access their supplier record, supplier contacts must select *General Info. > My Company Information* from the main menu.



The supplier record tabs and fields that supplier contacts have access to are configurable. In the standard application, suppliers can complete the following tabs: Identity, Information, Contacts, and Documents.

Collecting Required Data

Overview

Once the primary set of data is entered upon creation of the supplier record, you will need to further enrich the supplier's information.

The supplier record is not only composed of administrative data; it also includes a set of business data to help you manage your relationship with suppliers and better integrate them in the application.

The application offers a high flexibility in terms of defining which data are required, which data should trigger a warning when missing, and which data should go through an approval workflow.

In this section, we review how to populate the most salient types of business data:

- Supplier levels
- Supplier contacts
- Supplier scope / qualifications
- Services and skills offered
- Invoicing information
- Documents (credentials, certifications, and other documents)

You will find further information on these information types, as well as information types not covered in this section, in the Reference Guide (see p.82).

Supplier Levels

Overview

To define the operational structure of the suppliers registered on its supplier portal, IVALUA uses a set of levels:

- Group
- Head Office
- Site
- ERP (this last level being reserved for handling suppliers imported from ERPs)

The specific set of tabs available in the supplier record can be adapted to the position of the supplier in its hierarchy. Likewise, application objects such as RFPs, contracts, or orders, are each linked to a specific level.

With this in mind, each supplier can be assigned one or more levels. Smaller suppliers, for instance, could hold multiple levels concurrently, while more complex groups can be organized into hierarchies. To create such hierarchies, you need to proceed in 2 steps:

- Assign supplier levels
- Define the hierarchical links between the suppliers who belong to the same hierarchy

Assigning Supplier Levels

1. Display the supplier record *Identity* tab.
2. In the *Supplier Hierarchy* section, select the desired level from the *Level* drop-down list. Repeat to assign more than one level. Use the *Delete* icon ✖ to remove levels.
3. Click the **Save** button.

Defining Hierarchical Links Between Suppliers

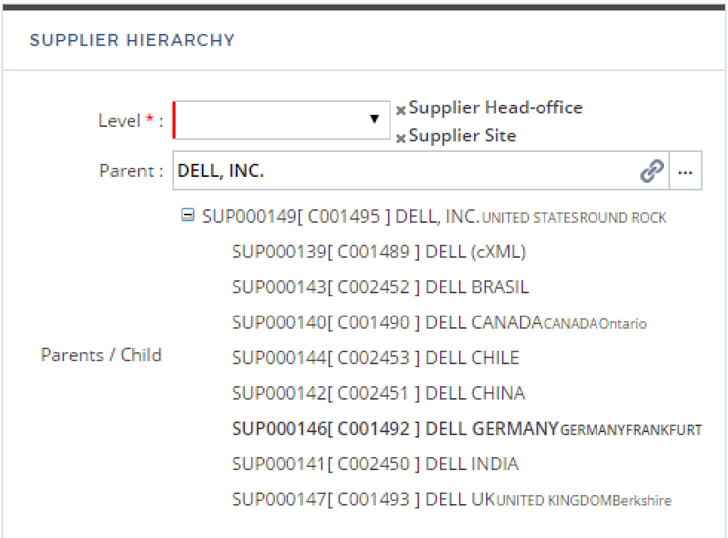
To create a hierarchy, you need to open each of the suppliers that are lower in the hierarchy and declare their parent supplier. The *Group* level being the highest level in the hierarchy, the *Parent* field is not available in supplier records that are declared as *groups*.

1. Display the supplier record *Identity* tab.
2. In the *Supplier Hierarchy* section, click the *Selector* button ··· placed next to the *Parent* field. The *Browse Suppliers* window is displayed.
3. Locate and select the desired parent supplier by clicking its *Select* icon.

   To be selectable as a parent organization, suppliers must be declared on a supplier level that is above that of the child supplier (even though, in the case of multi-level suppliers, they might simultaneously be declared on the same level as the child supplier).
4. Click the **Save** button.

In the list of suppliers, the parent/child relationship is indicated in the *Parent* column.

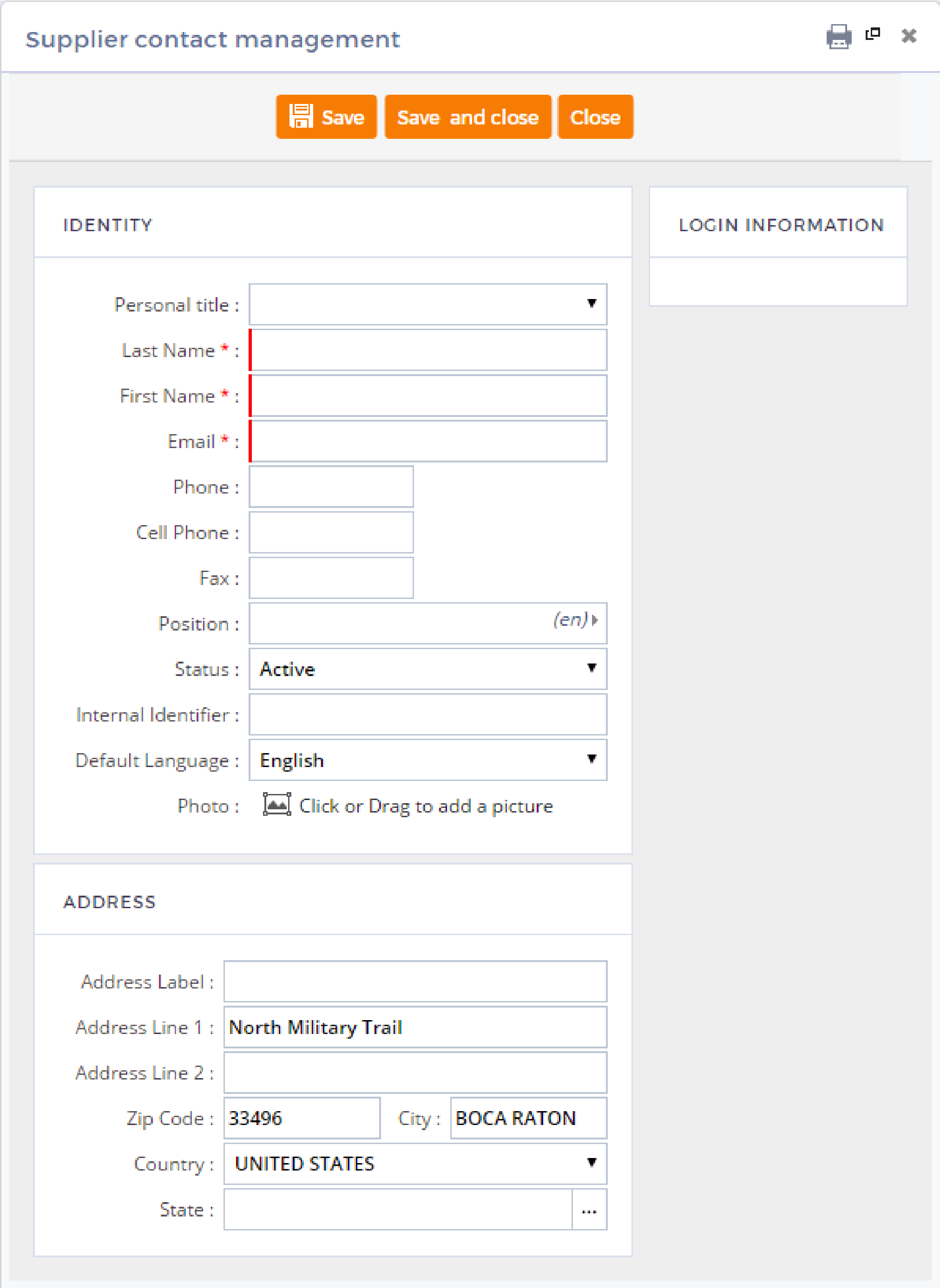
The *Parent/Child* field shows the supplier hierarchy structure. The current supplier is displayed in bold characters. Each supplier in the hierarchy is a clickable link that will display the selected supplier in a secondary window.



Supplier Contacts

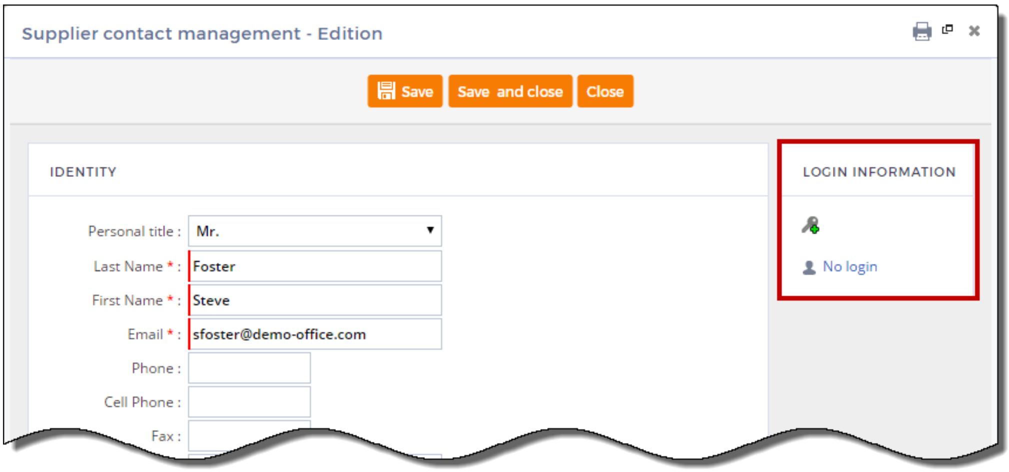
Creating a New Supplier Contact

1. Display the supplier record *Contacts* tab.
2. Click the **Create a contact** button. The *Supplier contact management* window is displayed.



3. Fill in the Contact Sheet.
4. Click the **Save** button.

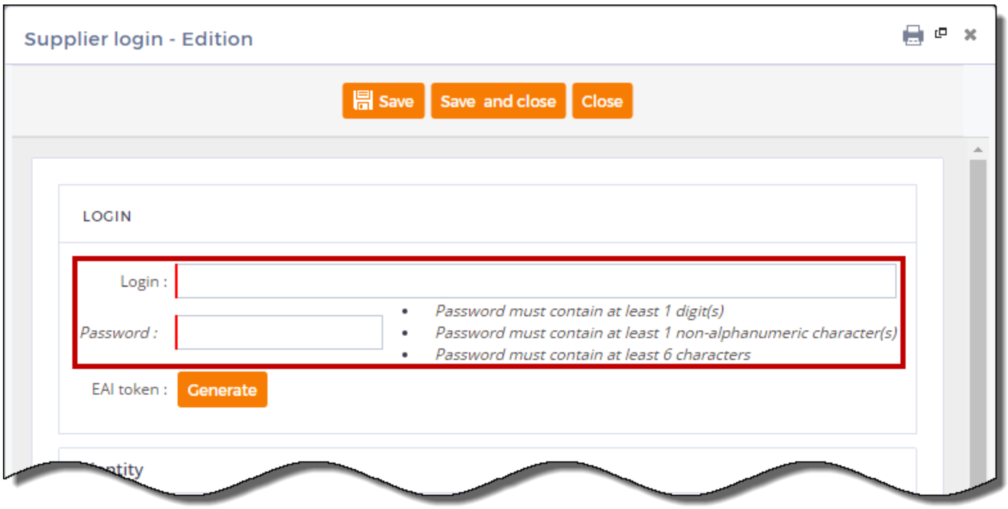
In the upper right corner of the window, the *Login information* area is now displayed and indicates that the current contact has no IVALUA user account (*No login*):



If the contact requires access to the supplier portal, you need to create an account for them.

5. To create a user account for the contact and send them their login ID and password, choose one of 2 methods:

   - Click to access the user account creation screen, assign a login ID and a password to the supplier contact, and then click **Save and close**.



   Then click to access a messaging window and send the contact an invitation with their login credentials.

   - The alternative method consists in using only this one last icon . This will create the user account, auto generate login credentials, and send the invitation in one single step. With this method, the contact's email address will be used as their login ID. A temporary password will be generated randomly.

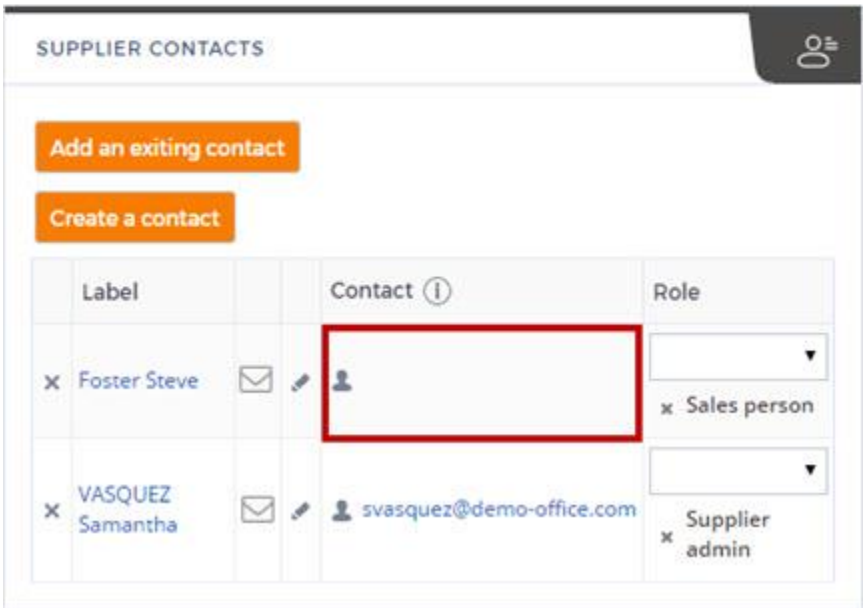
With both methods, a *Supplier* profile is automatically assigned to the contact.

6. Click Save & close.

In the *Contacts* tab, the contact's login ID is now displayed next to the *User Account* icon .

Creating a User Account for an Existing Supplier Contact

A Supplier record may include contacts with no associated IVALUA user account (for people who do not need to access the supplier portal). In the *Contacts* tab, these contacts have no login ID displayed next to their user account icon .



If at some point you want to give one such contact access to the supplier portal, you may use the icons and associated with the contact record in the same way as you would for a new contact (see p.19).

Managing Multi-Supplier Contacts

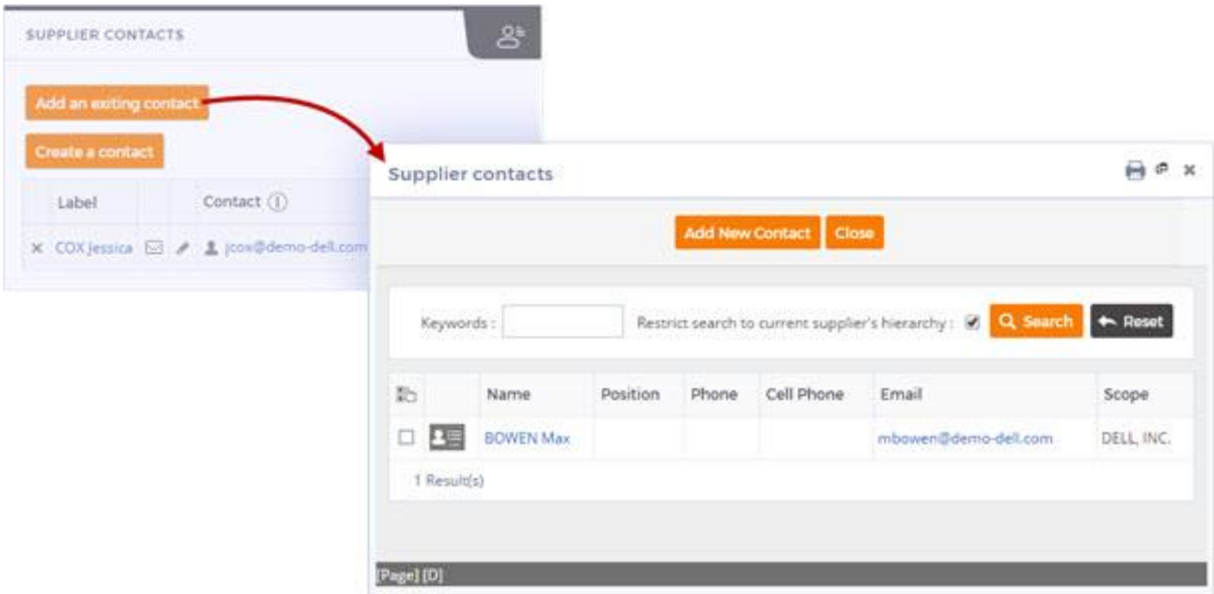
Overview

There are cases when a single person may need to be referenced as a contact person for several suppliers that belong to the same supplier hierarchy. These contacts are referred to as *multi-supplier contacts*.

When logged on to the IVALUA portal, multi-supplier contacts can easily change the supplier on behalf of which they are logged on without having to log off (see *Supplier View – Changing Supplier*, page 23).

Creating Multi-Supplier Contacts

To add to the current supplier record a contact that has already been created for another supplier record, use the button **Add an existing contact** in the *Contacts* tab: this will open the list of existing contacts that are accessible to the current supplier.



By default, the contacts listed are contacts:

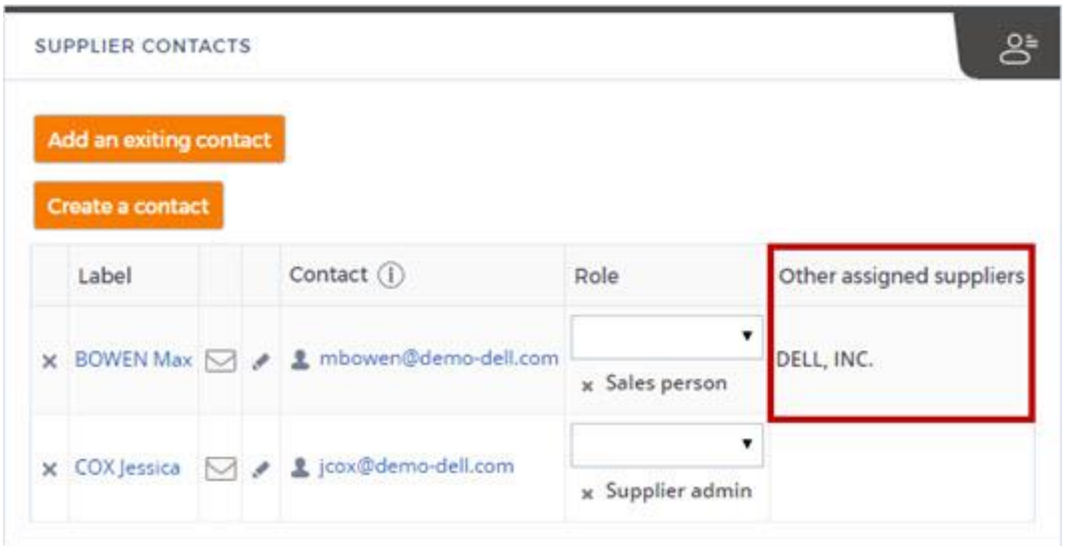
- From parent suppliers (level immediately above and higher up)
- From child suppliers (lower levels)

To access other contacts, disable the search filter *Restrict search to current supplier's hierarchy*.

Identifying Multi-Supplier Contacts

Multi-Supplier Contacts are easily identifiable in the *Contacts* tab of the Supplier record. The column *Other assigned suppliers* shows the name of other suppliers the contact is attached to.

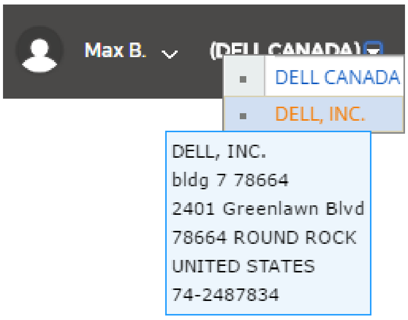
The number of displayed characters is limited; an ellipsis indicates that this number is exceeded; you may then display the full list of linked suppliers by hovering your mouse cursor over the table cell.



Supplier View – Changing Supplier

Multi-supplier contacts cannot access simultaneously the data of all the suppliers they are attached to. They are always connected on behalf of a given supplier; however, they can easily change suppliers.

For multi-supplier contacts, a down-pointing arrow icon is displayed in the upper right corner of the navigation header. Clicking this arrow will display the list of the suppliers the contact is attached to. By hovering your mouse cursor over a supplier name, you can display a tooltip with additional information:



The tooltip includes the following information:

- Corporate Name
- Main Address (in the absence thereof, in order of priority, Payment Address, or Delivery Address)
- Supplier ID #: SIRET (in the absence thereof, in order of priority, SIREN, or TAX ID, or DUNS)

To toggle from one supplier to another, click the name of the desired supplier.

The name of the supplier you are currently connected on behalf of is displayed in parenthesis.

Supplier Scope (Qualifications)

Overview

The supplier scope indicates which organizations the supplier will be able to work with, the commodities they sell, and the approval status they receive for these.

The supplier scope is defined and managed in the *Qualifications* tab.

This same tab also includes *Geographical Coverage, Customer References*, as well as *Additional Information Declared by the Supplier,* which contains information the supplier provided during the registration process about the regions served and commodities offered.

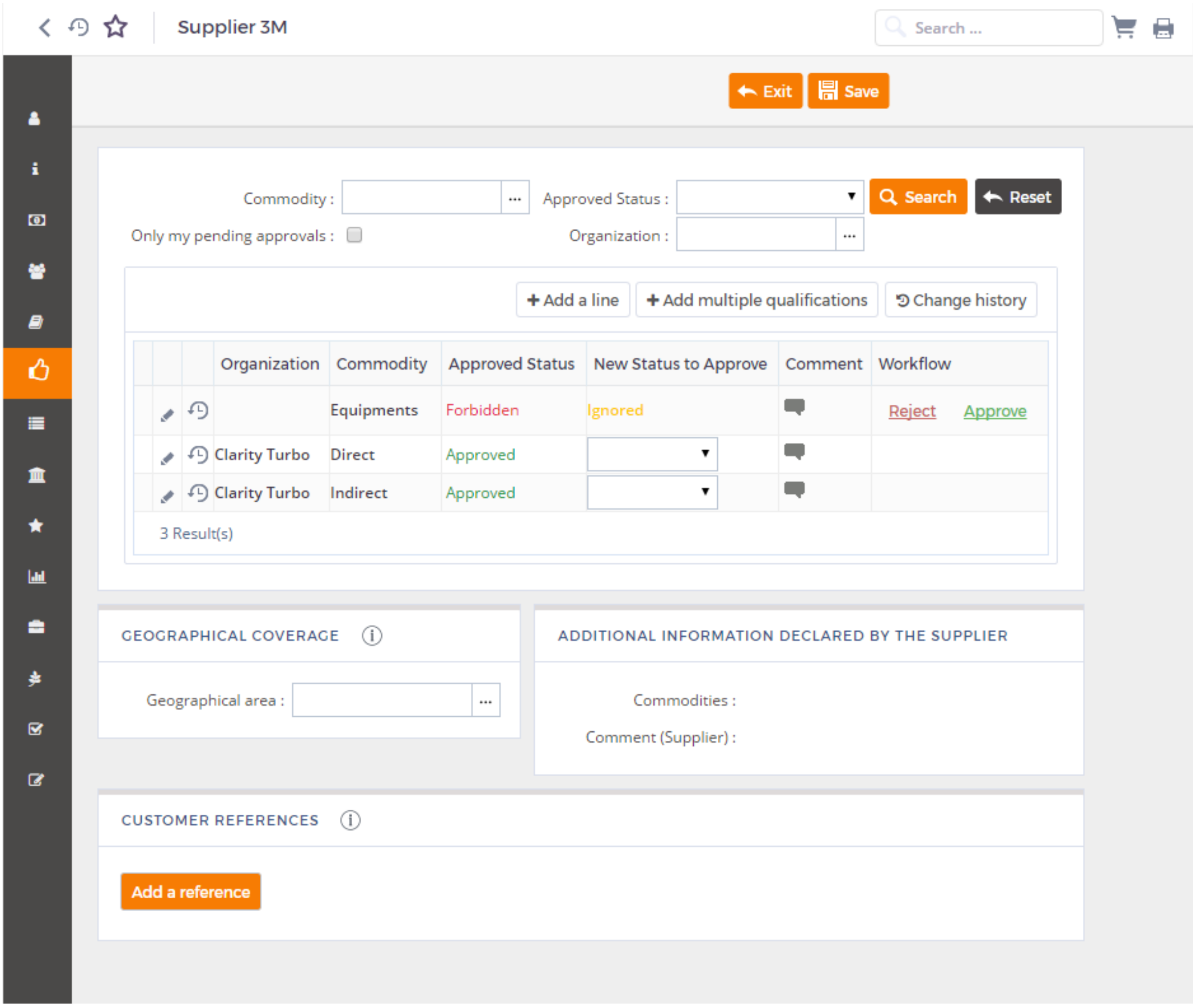
To define the supplier scope, you —as an internal user— will use the qualification grid displayed in the upper part of the tab. The supplier scope is defined by adding "qualifications" which combine an organization and/or a commodity, and an approval status. This tab can be configured to require each new qualification to be submitted to a dedicated approval workflow.

Access Rights

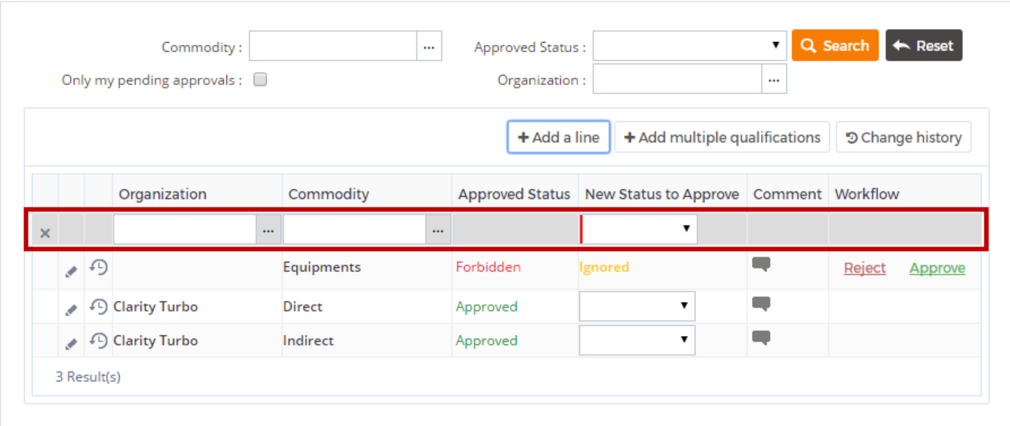
Editing qualifications requires the authorization *SUP – Edit authorization (auth_sup_approval_manage)*.

Requesting a Qualification Approval

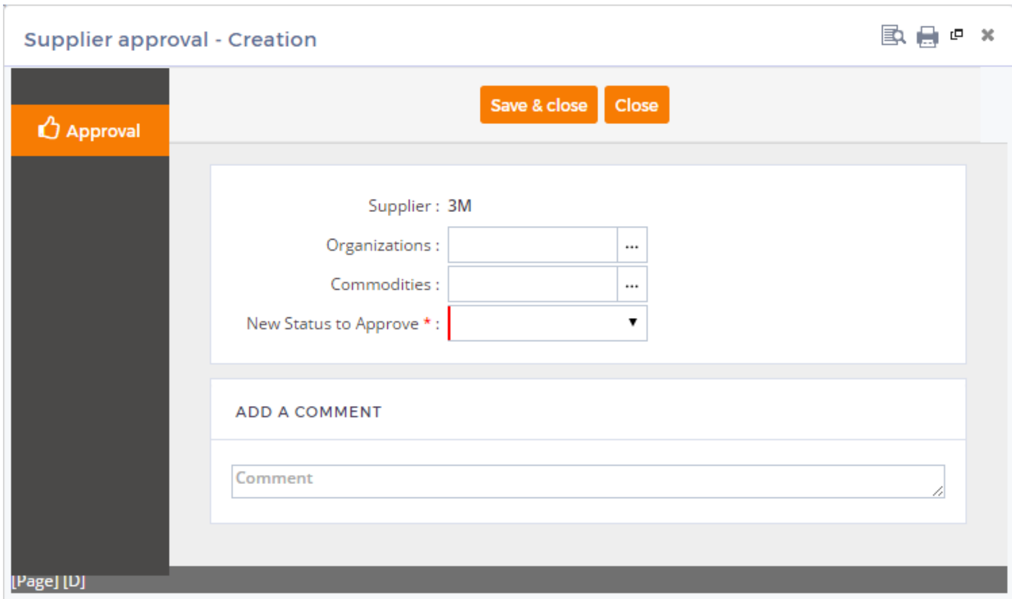
1. Display the *Qualifications* tab of the supplier record.



2. To add a single qualification line, click the button **Add a line**. A blank row appears in the qualification list.

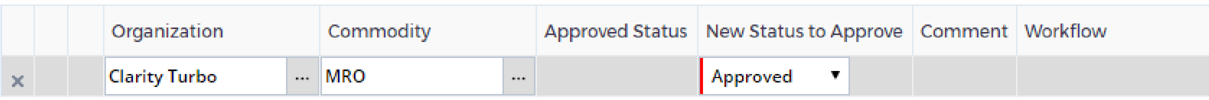


To assign a qualification status to multiple organizations/commodities, click **Add multiple qualifications**.

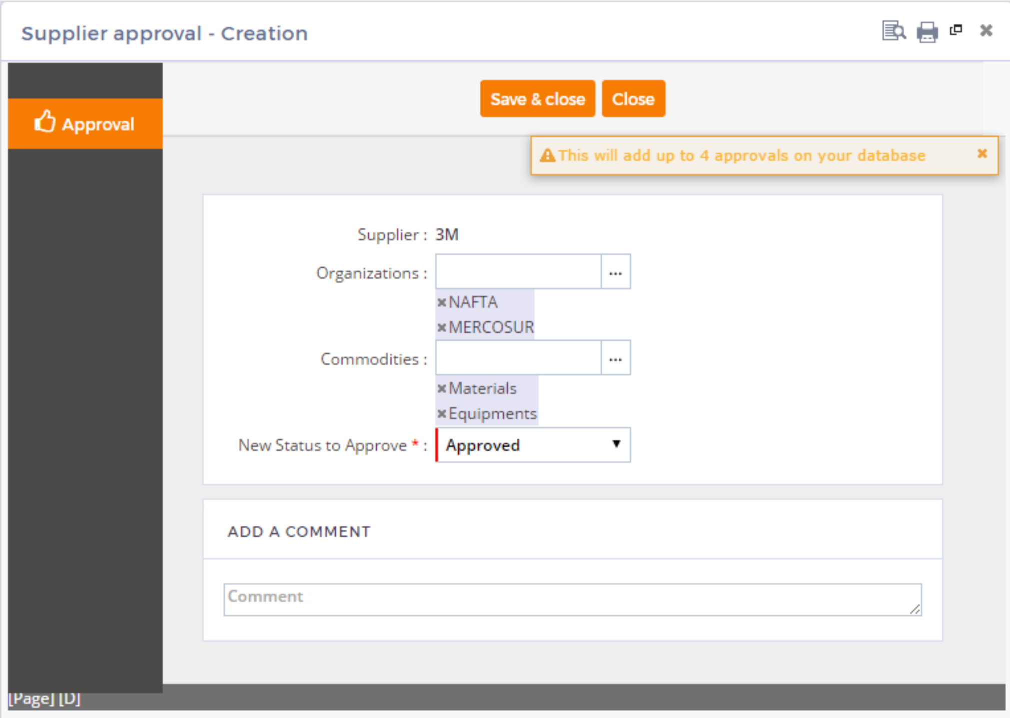


3. Select:
   - The buying organizations and the commodities concerned (optional: if you do not select any organization/commodity, the approval will apply to the whole organizational/purchasing scope)
   - The status you want you want to apply to your selection

Single line:



Multiple lines:



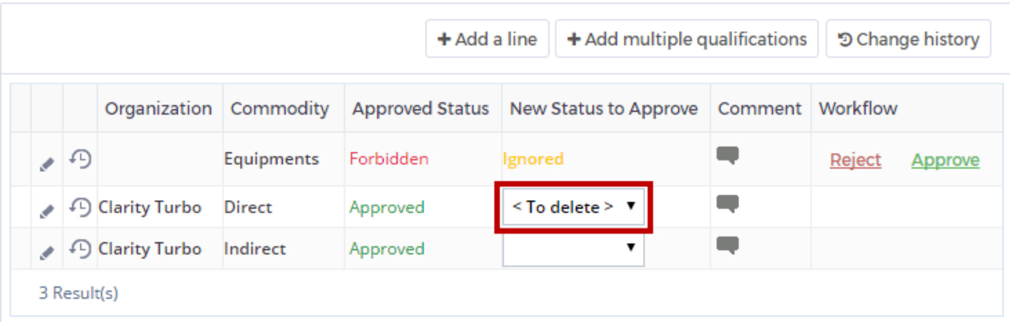
4. **Save** to create the corresponding qualification line(s).

   The system automatically creates one entry for each possible organization/commodity pair, depending on your selections.

   Depending on your system configuration, new qualification lines may be effective at once, or may be subjected to an approval workflow (see page 27).

Modifying or Deleting an Existing Qualification

1. Locate the qualification line whose status you want to change, then select the new status from the *New status to approve* drop-down list on the same row. To delete a qualification, select < To delete > in the status list.

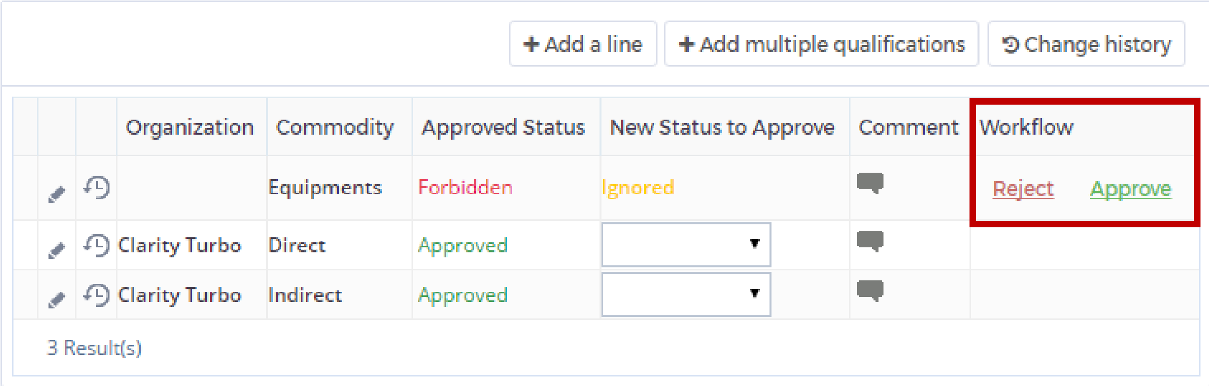


2. Click the **Save** button.

   Depending on your system configuration, your modification may be effective at once, or may be subjected to an approval workflow (see page 27).

Approving a New Qualification or a Qualification Status Change

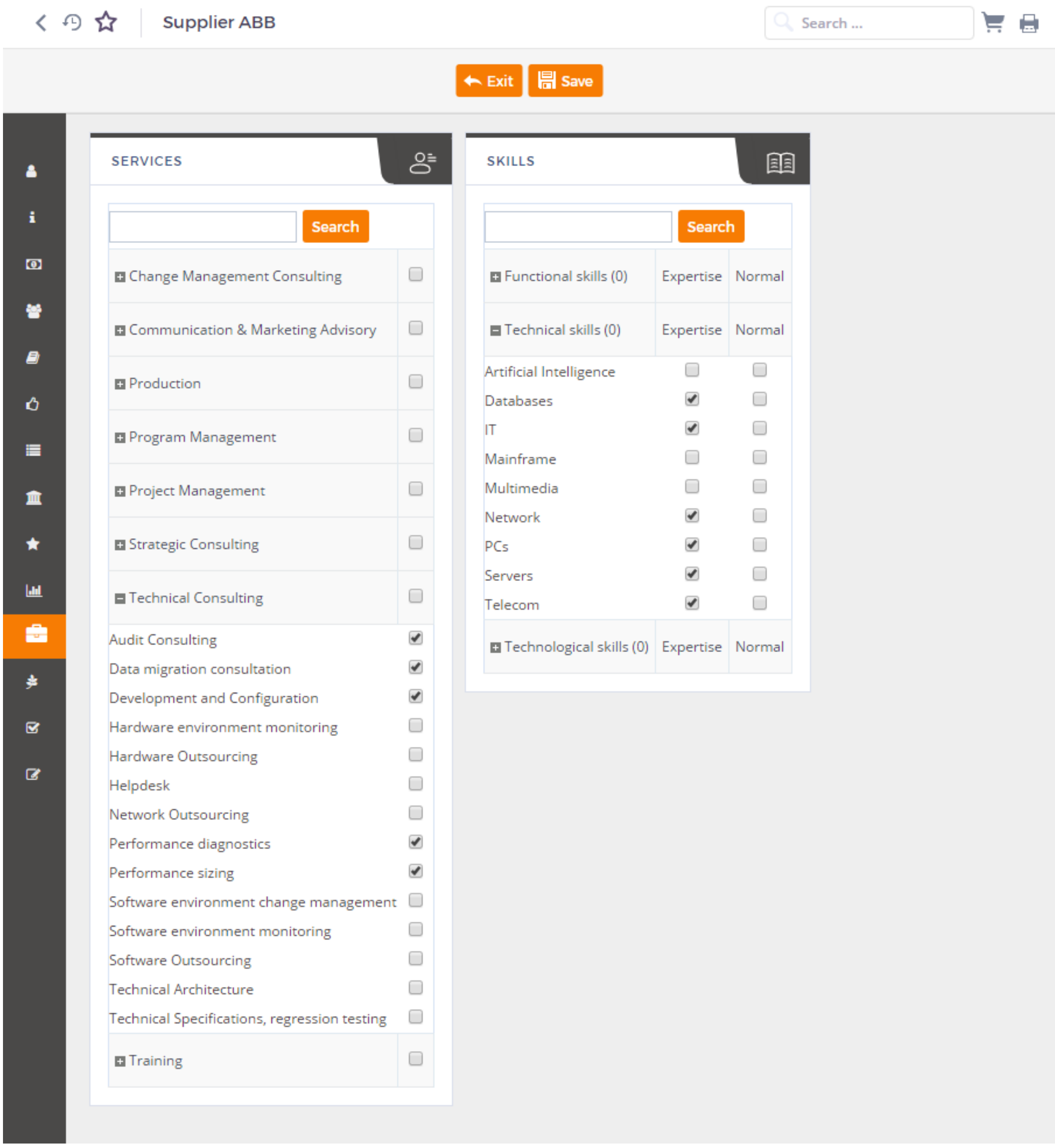
When your system configuration requires that new qualifications or qualification changes be approved through a workflow, the workflow performer is notified by email. By clicking the link provided in the email message, the performer will land on the supplier Qualifications tab where they will be able to reject or approve the qualification line.



Services and Skills

The *Services* tab allows you to select the services and skills offered by a supplier. When a request for professional services is issued as part of a sourcing process, this selection will serve to sift candidate suppliers in service requisitions.

To select services and skills, expand relevant items, select all appropriate checkboxes, and click save.



Invoicing Information

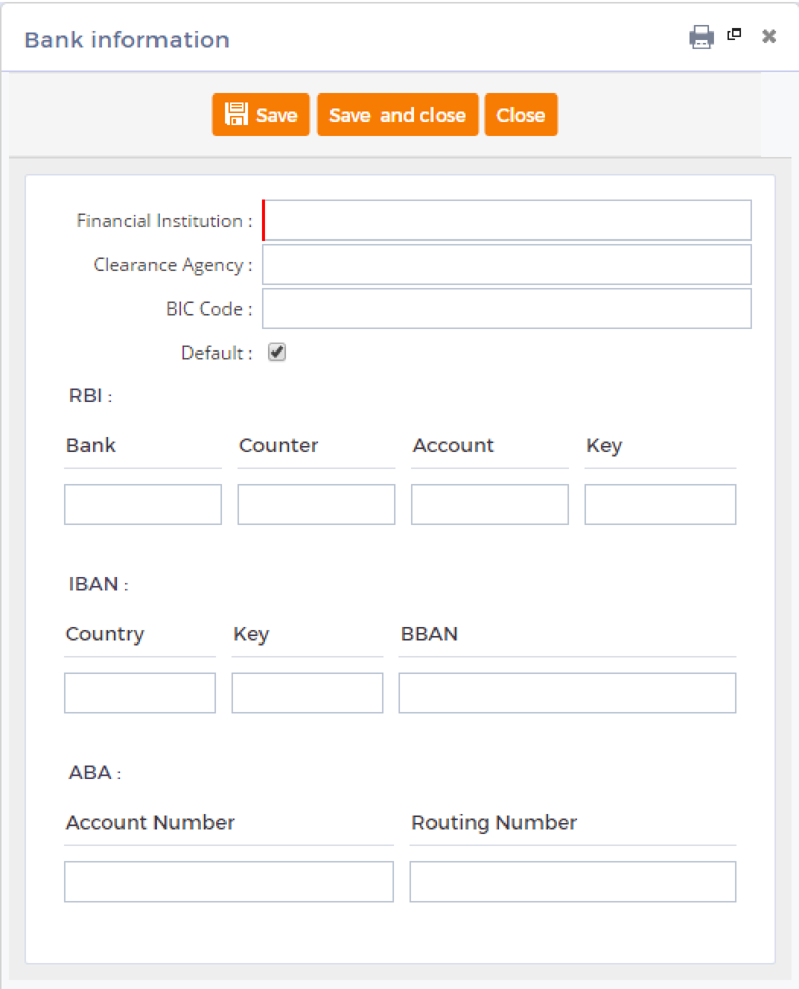
Declaring Supplier Banking Information

This area provides a space to declare the supplier's bank accounts to be used in the P2P process.

To declare a new set of banking information:

1. Display the supplier record *Invoicing* tab.
2. Click the **Add Banking Info** button.

   The *Bank Information* window is displayed.



3. Enter the name of the financial institution.
4. Key in the corresponding bank and bank account identification numbers.

   Here are some input guidelines:

   - When keying in the IBAN, you must remove the spaces in the BBAN field.
   - ABA is specific to the USA.
   - RIB is specific to France. The RIB is automatically populated based on the IBAN when the IBAN country code is FR. The reverse is also true: if you enter the RIB, the IBAN will be auto populated.
5. You can set up several accounts for a supplier: use the *Default* box to designate the primary account.
6. Click Save and close.

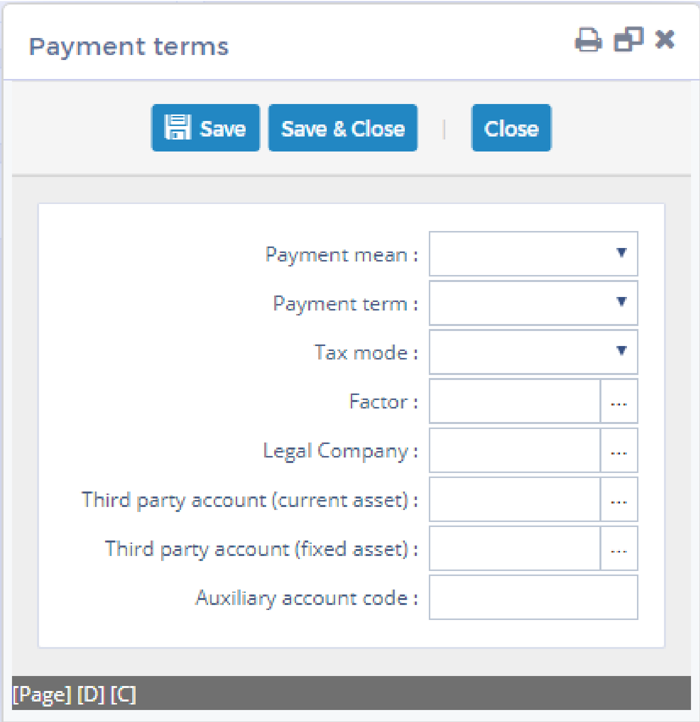
Declaring Supplier Payment and Accounting Information

Payment and accounting information sets can be defined per legal company and are used to default payment and accounting information in the P2P process. They include: payment type and terms, tax mode (self-assessment), third party accounts for current and fixed assets, and auxiliary account.

To declare a new set of payment and accounting info:

1. Display the supplier record *Invoicing* tab.
2. Click the Add Payment & Accounting Info button.

   The *Payment Terms* window is displayed.



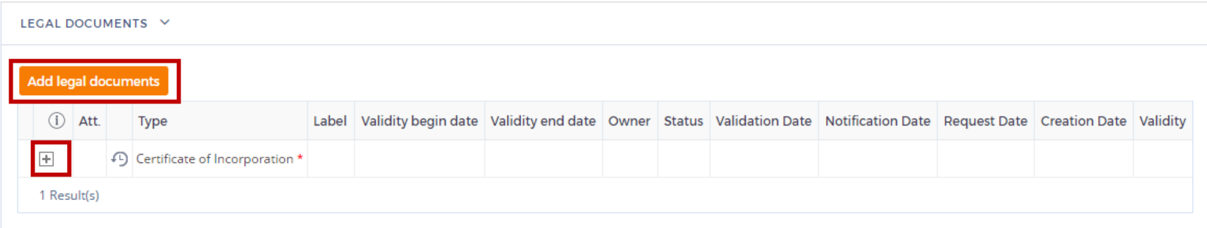
3. Fill in the fields. For detailed explanation of each field, see p.91.
4. Click Save & close.

   The new *Payment & Accounting Information* set is now listed in the *Invoicing* tab.

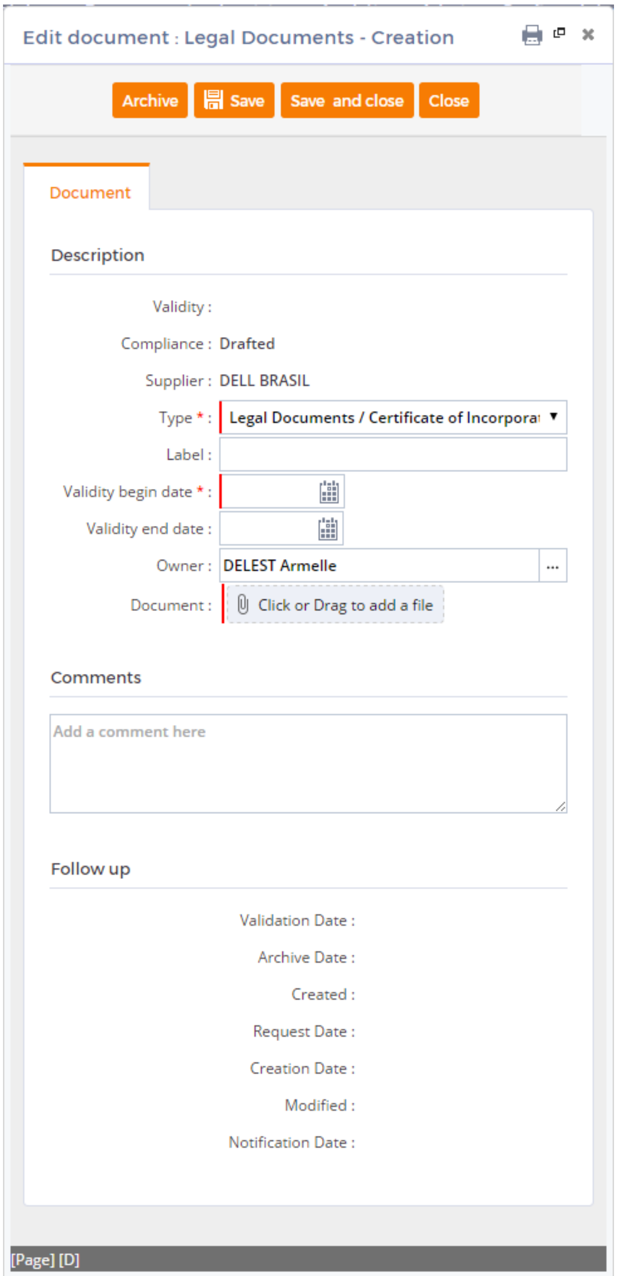
Documents

Attaching Documents

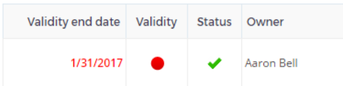
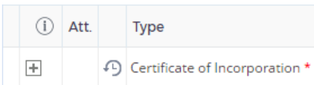
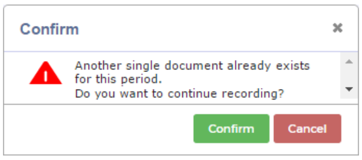
1. Display the supplier record *Documents* tab.
2. Click the button **Add a document** in the desired category frame, or else click the *Add* icon ⊞ associated with the document type you wish to upload.

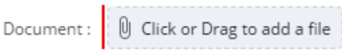


The *Edit document* window is displayed.



3. Fill in the fields, referring to the table below.

Field	***Description***
Validity	Document validity status in relation to its validity begin and end dates Auto-calculated and read-only Three possible validity statuses: Valid Impending expiry: the document has reached the alert delay defined for the document type Invalid: the document is not in its validity period (end date exceeded or begin date not reached) When the end date is exceeded, it will be displayed in red characters. 
Compliance	Document compliance status An approval workflow can be associated with each document type so that the buyer can approve the documents uploaded by the supplier in the portal. The document compliance status is displayed in the form of a visual indicator –red cross or green check mark) and is further specified in a tooltip: Compliant Being created, To be checked or Compliant When there is at least one non-compliant document, the supplier will be displayed with an overall non-compliant status in the supplier list.
Supplier	Current supplier Auto-filled and read-only when the window is accessed from the Supplier record
Type	Document types are configured by the Administrator. Through document type configuration, the Administrator can specify: ▪ Which document types are **available** and which are **required**; these characteristics can vary based on country, commodity, organization, and other custom criteria. Required documents are always listed in their category even if no document has yet been uploaded for the corresponding type. Missing required documents are signaled with a red asterisk.  ▪ Which documents should remain unique (**single document type**): Only one document of such a type should be valid at any time. If you attempt to validate a 2nd document, a non-blocking warning message will be displayed.  ▪ **Validity duration**: The validity duration associated with a document type allows for automatic calculation of the validity end date based on the validity begin date. ▪ **Advance notification days:** number of days in advance of the expiry date that suppliers should be prompted to update a document. ▪ Whether the document **conformity status is workflow-driven or selected manually**; for a given document type, a different workflow ca be implemented per country, commodity, and/or organization.
Label	Name of the document

Field	*Description*
Validity begin date Validity end date	These dates determine the document validity period. The validity begin date is required. The validity end date is auto filled based on the validity begin date and on the validity duration defined for the selected document type.
Owner	Defaulted to the user who adds the document
Document	Allows you to upload document files. 
Comments	Allows free text input for comments
Follow up	Auto filled and read-only follow up dates

4. Click the **Save and close** button.

Archiving/Unarchiving Documents

Documents whose validity date is exceeded can be archived.

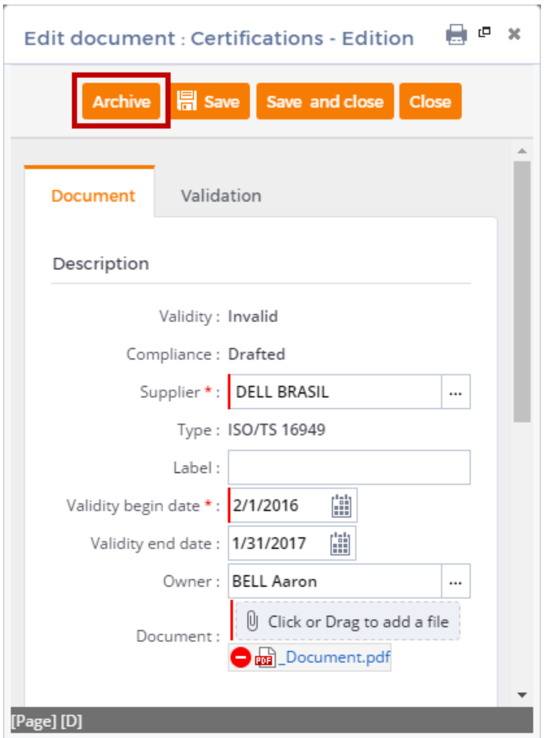
By default, archived documents are not displayed in the *Documents* tab. To display these documents, select the checkbox *Display archived documents* in the filters area, and then click the **Search** button.

To archive a document:

1. Click the *Edit* icon of the document you wish to archive.

   The *Edit document* window is displayed.

2. Click the **Archive** button available in the action bar.



   A message will be displayed, that invites you to confirm your request.

3. Click **OK**.

Once the document is archived, the **Archive** button is replaced by the **Unarchive** button.

Activating a Supplier

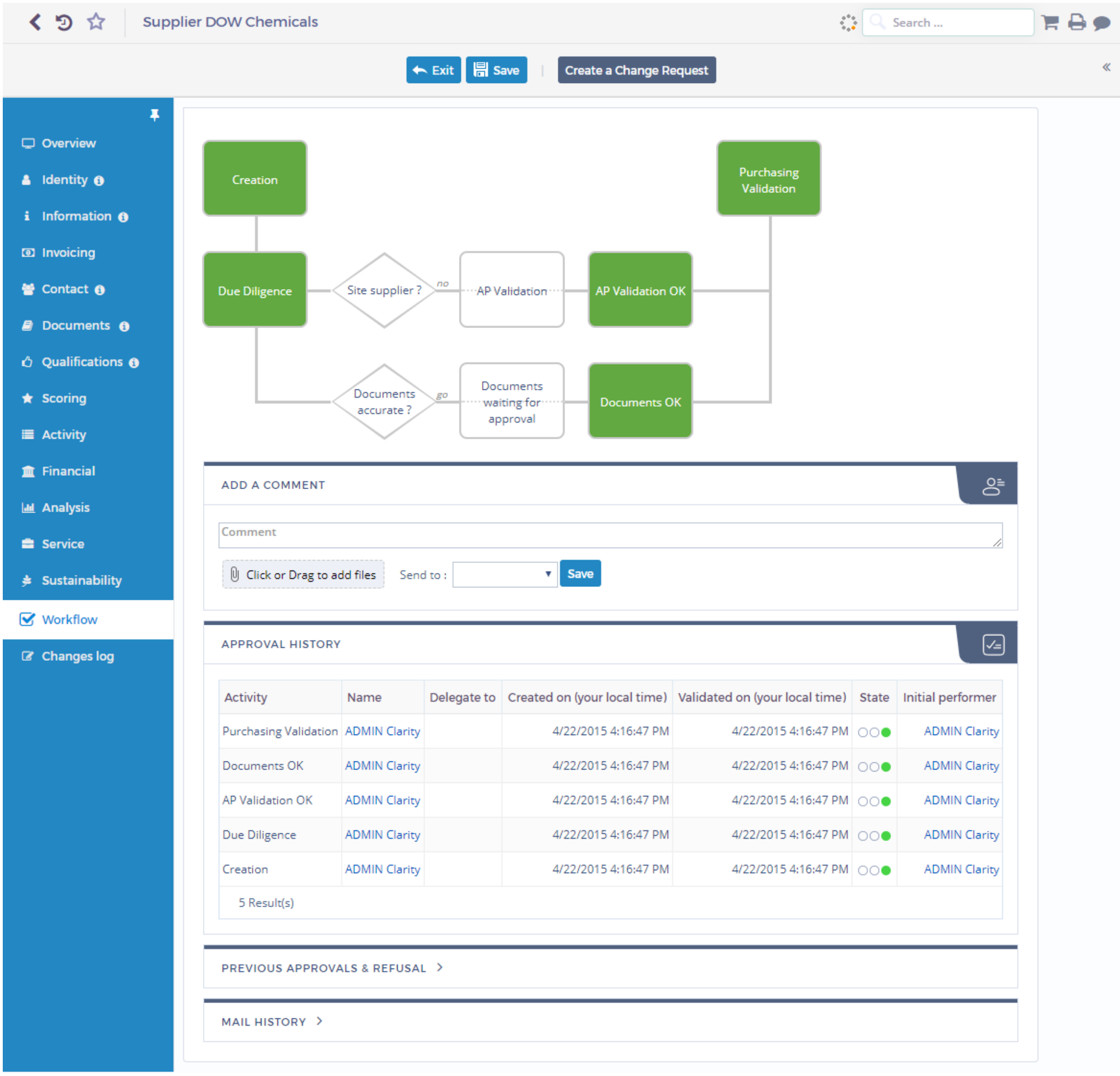
Supplier activation is the process whereby you set up a company as an **approved supplier** after having ensured you can efficiently conduct business with that company.

Supplier activation is a necessary condition before a supplier becomes selectable in P2P and Sourcing processes.

To launch the supplier activation workflow in the out-of-the-box version, click **Submit for Due Diligence**.

Once submitted, the Supplier Record will be routed to all pertinent stakeholders who will carefully vet the data and documents.

The supplier activation workflow is configurable by an Administrator and can be modified to suit your business processes.



MANAGING SUPPLIER DATA

Controlling Changes to Supplier Data through Supplier Change Requests

Change Requests

Supplier change requests are used to implement and manage a change process for supplier data.

When onboarding a new supplier, their data is reviewed and approved, and once the supplier is activated in IVALUA, their data becomes read-only.

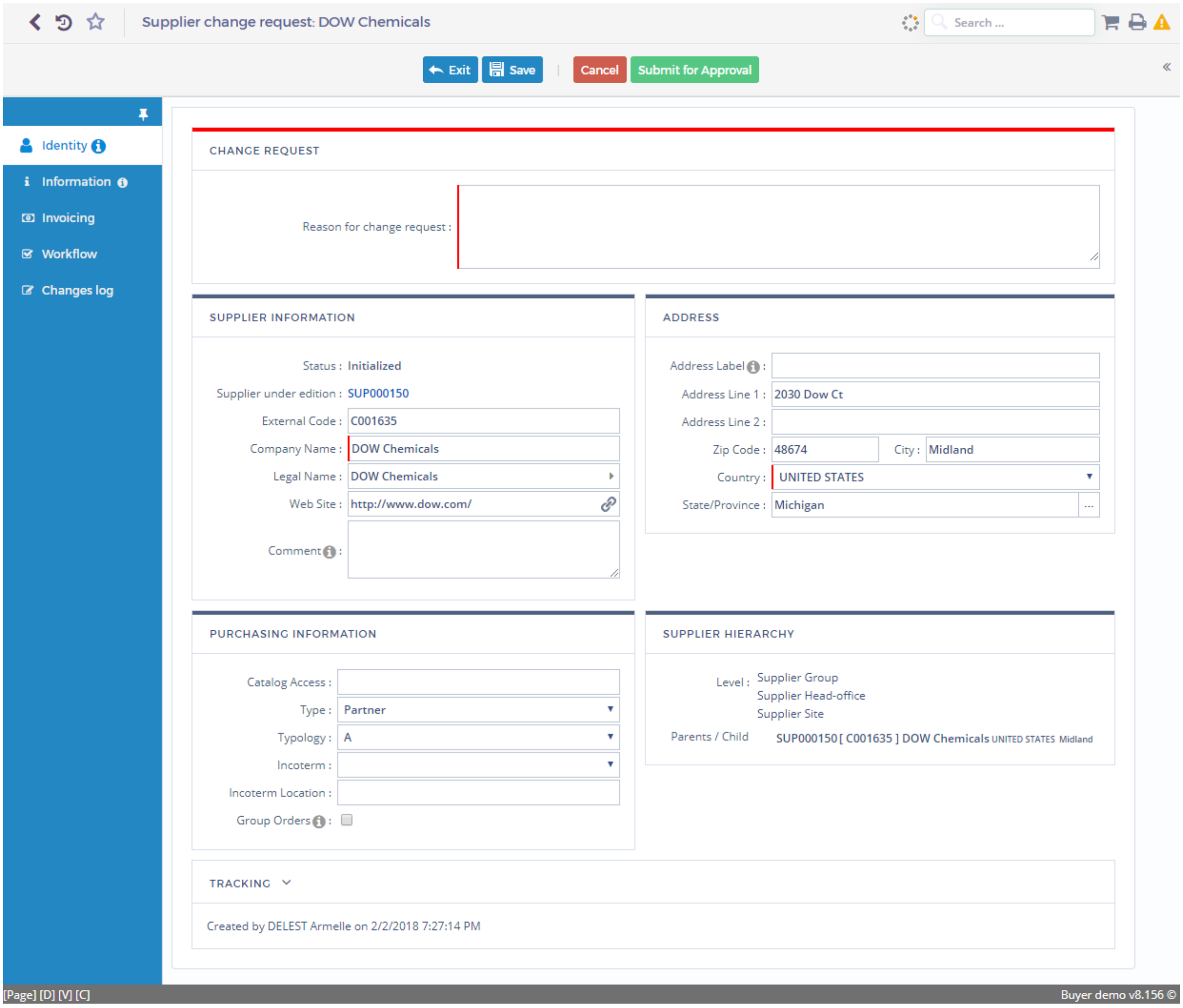
- To update supplier records with an “Activated” status, users (Internal or Supplier) need to create a change request.
- A change request is a copy of the supplier record that has its own approval workflow.
- Once the change request is approved, modifications are committed to the original supplier record.
- Only one change request can ever be in progress at any given time; in the meantime, and until the change request is approved or canceled, the supplier record is locked.

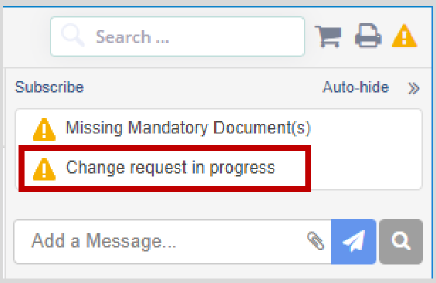
Note that IVALUA can be configured to trigger an update of ERP data upon approval of a change request.

Managing Supplier Change Requests

Creating a Supplier Change Request

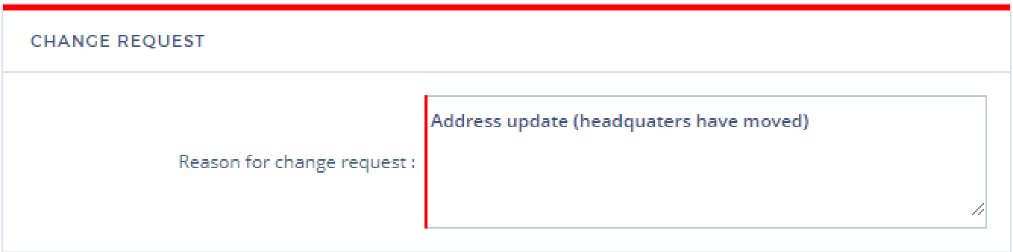
1. Go to the Suppliers / Browse Suppliers page.
2. Open the desired Supplier Record.
3. Click on **Create a change request**. This will display a new Supplier Change Request record (see p.41 for further information on the user interface).



> ***Note***
>
> You can edit supplier Contacts and Documents without creating a change request.
>
> If a change request is already ongoing for a supplier, a message is displayed in the Supplier Record sidebar and the record is locked until the ongoing request is approved or canceled (**Create a change request** button is unavailable).
>
> 
>

Filling a Change Request and Submitting it for Approval

1. Indicate the reason for the change in the dedicated required field.



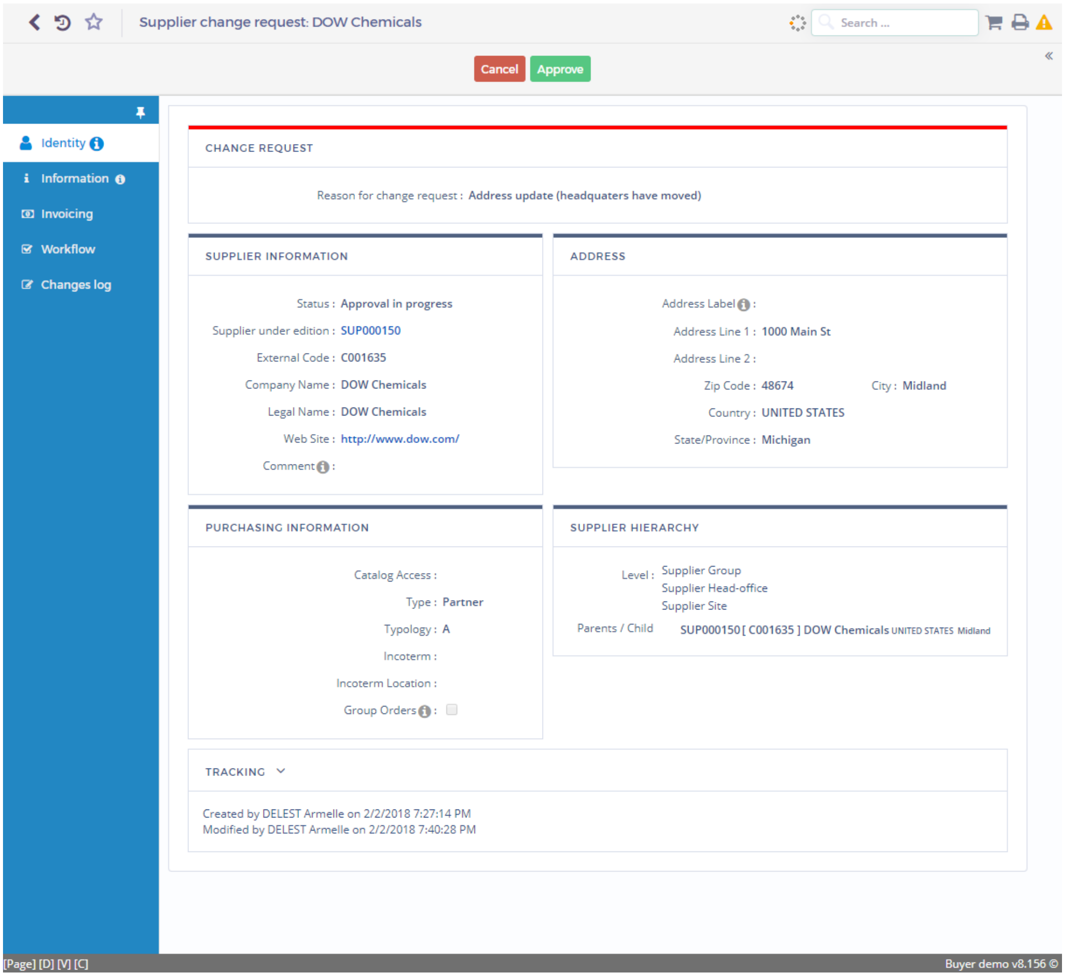
2. Enter new data or write over existing data you wish to change in any of the available supplier data tabs (here *Identity*, *Information*, and *Invoicing*).
3. Save.
4. When all your changes are done, click **Submit for approval**.

   This will launch the change request approval workflow and approvers will be notified. You'll have to wait until your change request is approved to see new values appear in the Supplier Record.

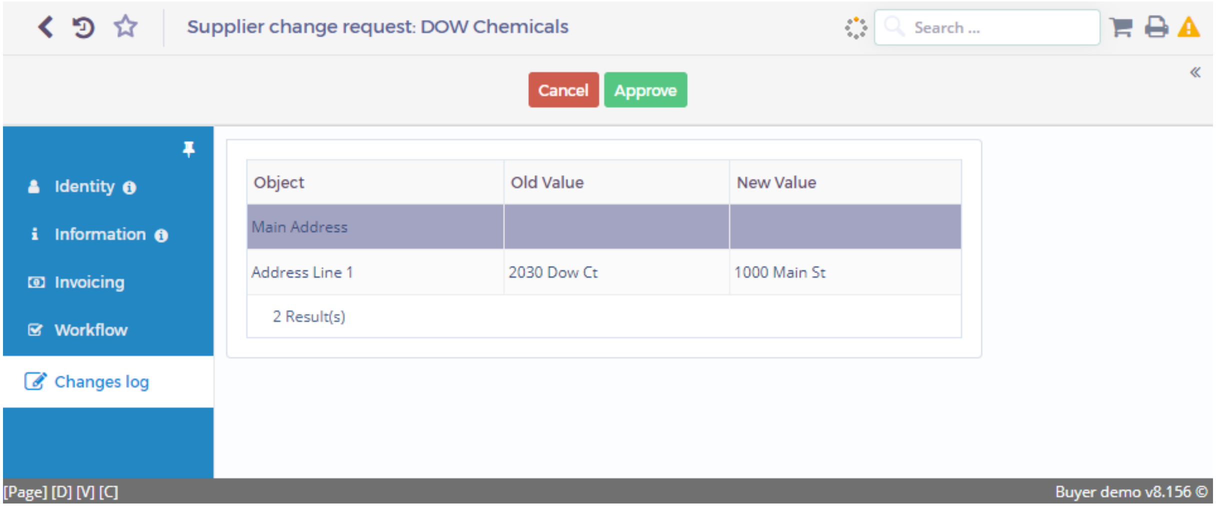
Approving or Rejecting a Supplier Change Request

As an approver, you'll be notified by email whenever a new change request requires your approval.

1. Click the link provided in the notification email to directly access the change request.



2. Review the change request. To help you spot modifications, be sure to take a look at the *Changes log* tab, which points to changes and presents a side-by-side comparison of current values and new values. More on the *Changes log* tab, p.42.



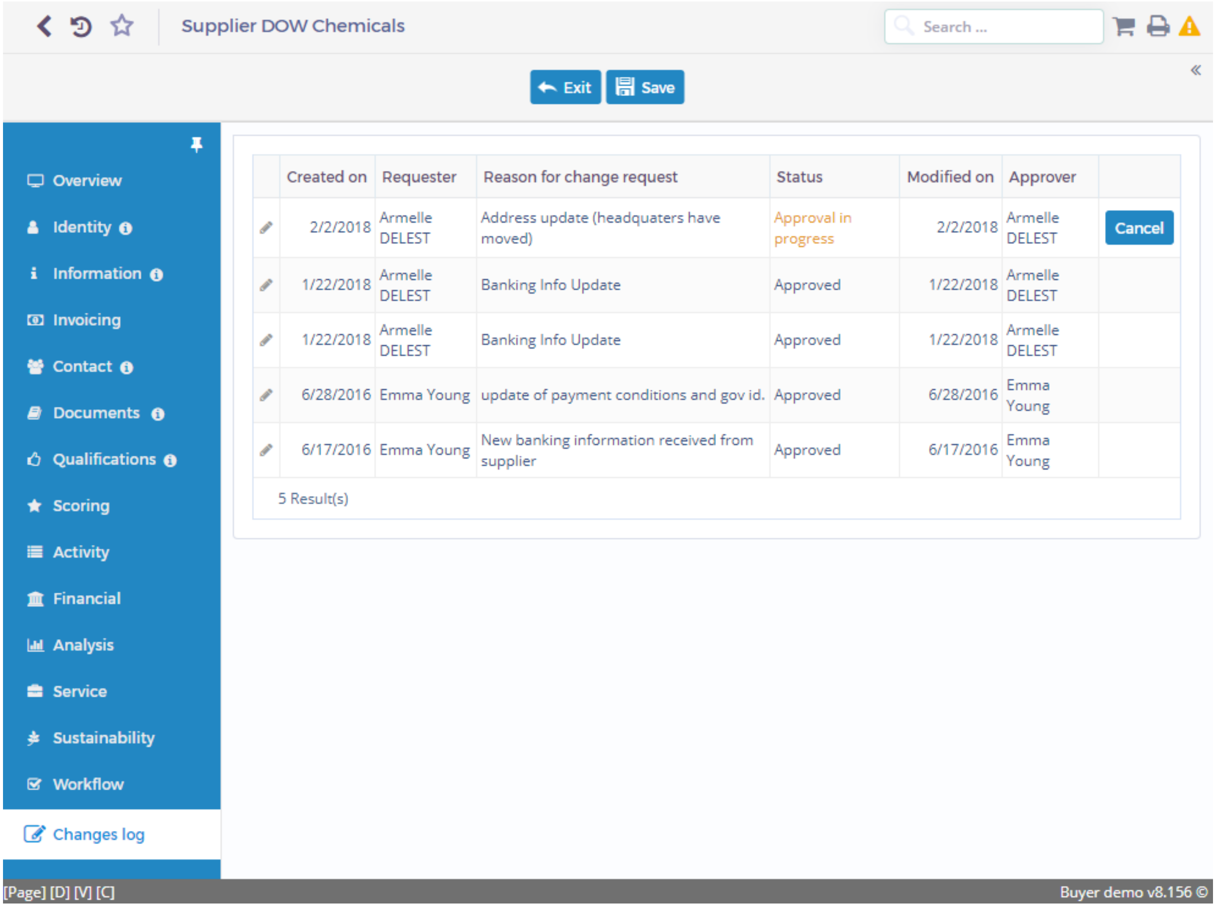
3. Approve or cancel the change request using the dedicated buttons in the action bar.

Note: You can also cancel ongoing change requests from the Supplier Record (*Changes log* tab) by clicking on the **Cancel** button associated with the change request.

Accessing Existing Supplier Change Requests

All supplier change requests (in any status) are listed in and can be accessed from the Supplier Record.

1. Open the Supplier Record.
2. In the *Changes log* tab, click the pencil icon of a change request to open it.

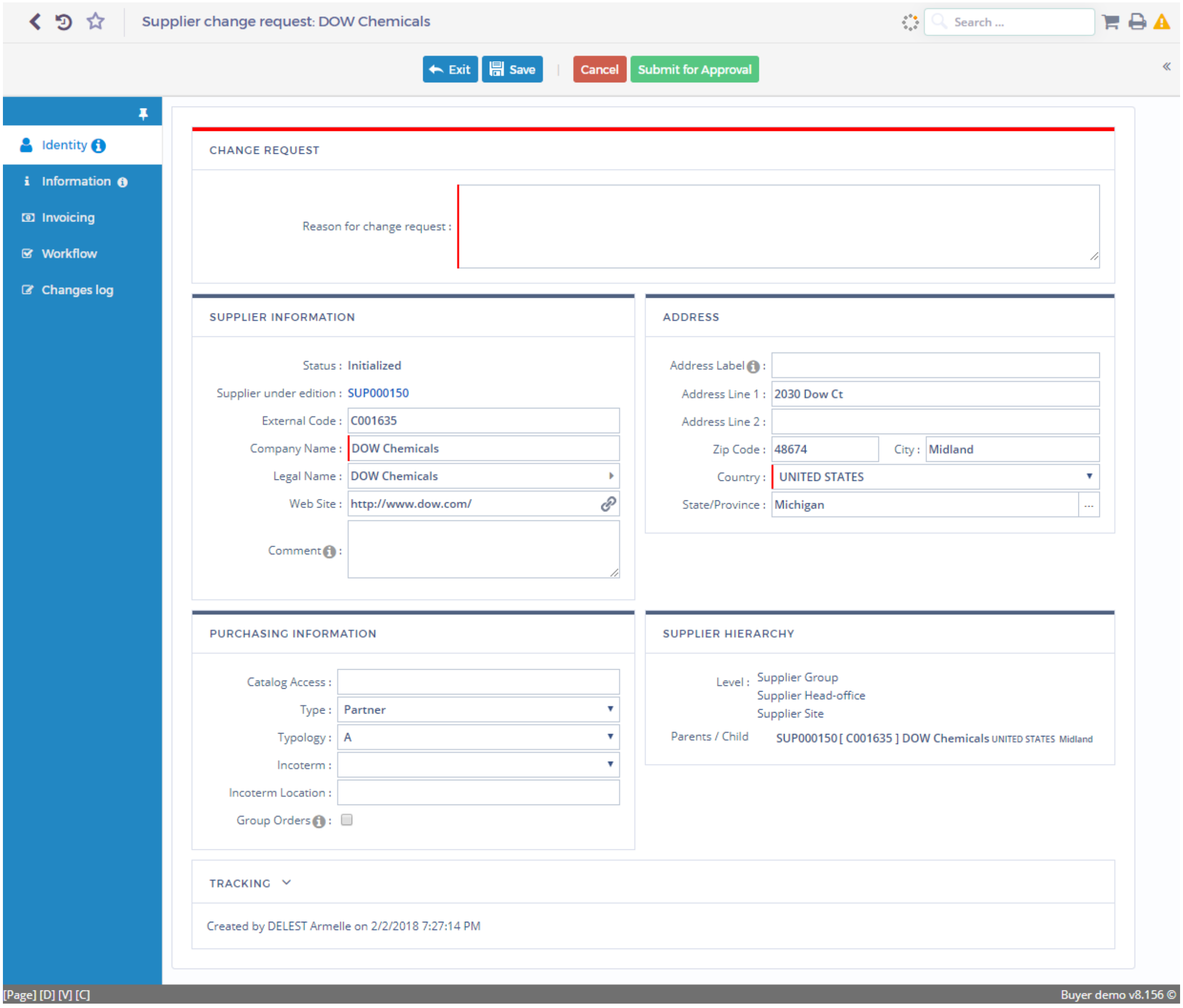


Getting Familiar With the User Interface

Supplier Change Request

Supplier Change Requests are copies of editable Supplier Record tabs and fields where you can enter the edits you want to make in the Supplier Record. The change request comprises the following tabs:

- Supplier data tabs
- *Workflow* tab
- *Changes log* tab



On an ongoing change request, only the requester can edit data until the change request is submitted for approval.

Supplier Data Tabs

Change requests only include the Supplier Record tabs and fields that are available for change. However, it is possible that certain read-only fields be displayed for information purposes.

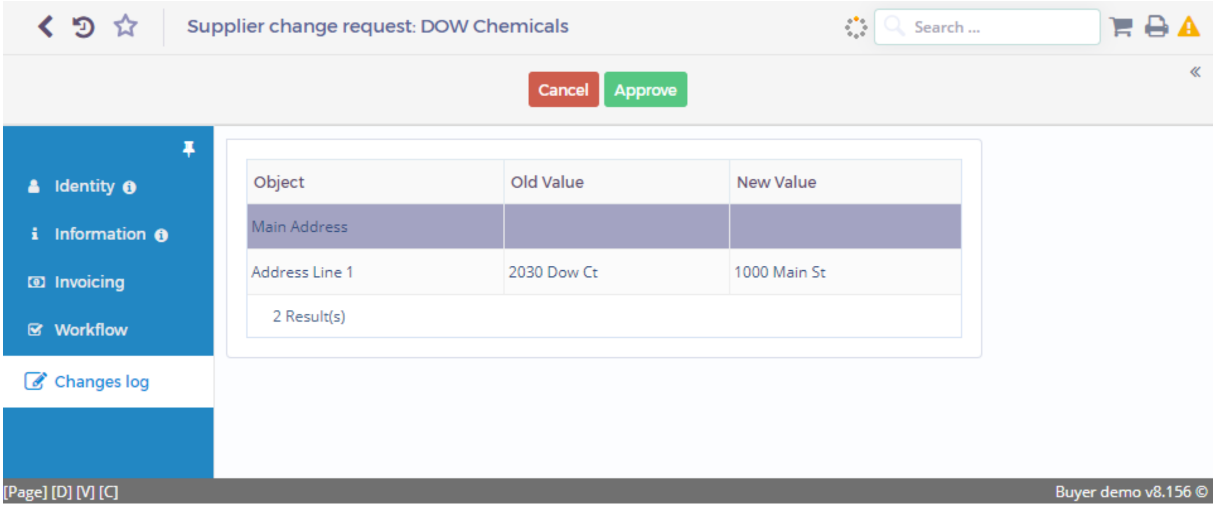
To request changes to the Supplier Record, simply complete empty fields and/or type over existing data in editable fields.

Changes Log Tab

The *Changes log* tab lists the fields that have been edited in the request and presents you with a side-by-side comparison of the current and new values.

This tab is not displayed to suppliers for confidentiality reasons because it's not possible to filter out from the logs data that is restricted to internal users only.

In the out-of-the-box version, all fields are tracked in the change request log.



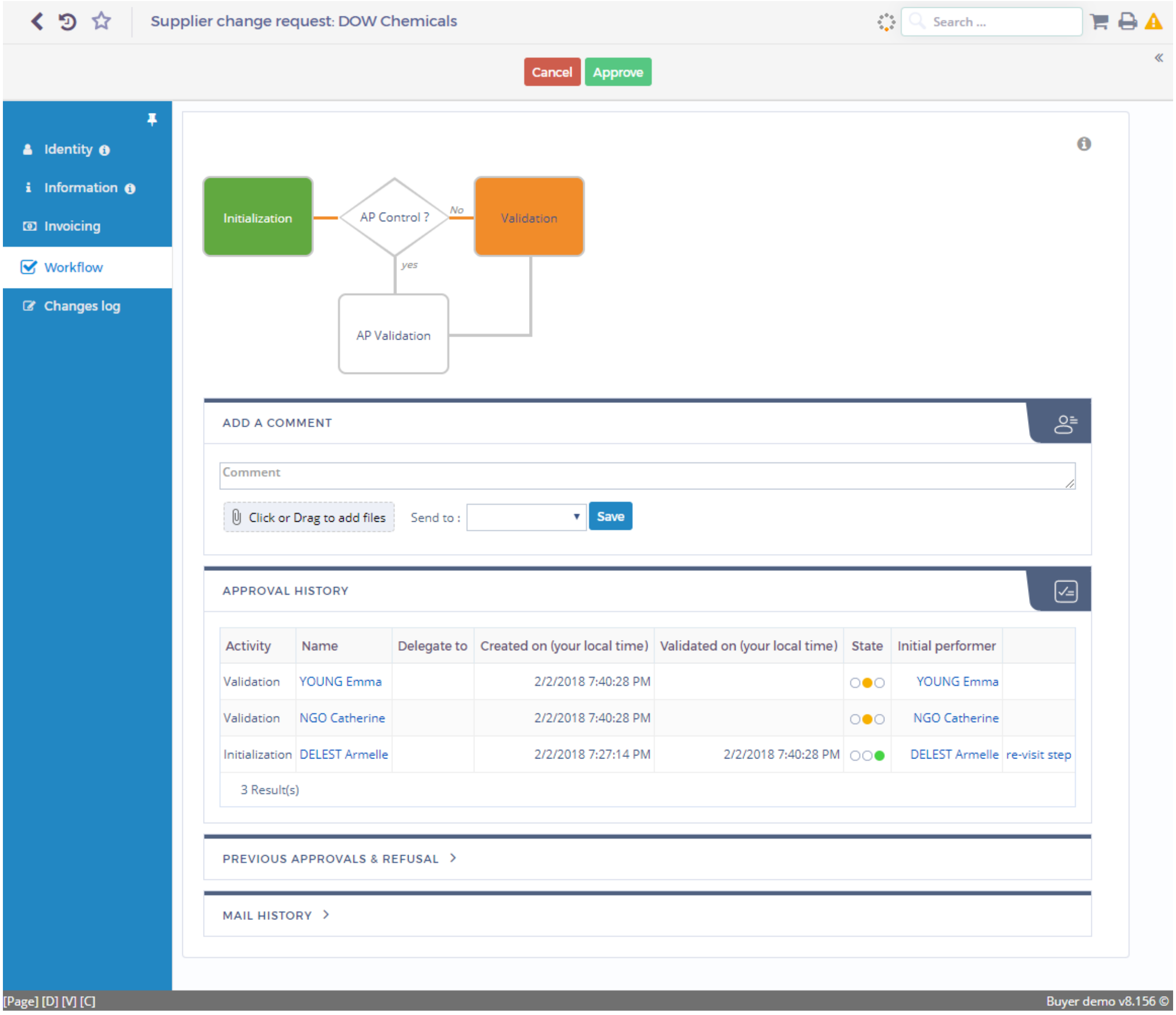
The change log grid displays the following information:

- **Object:** Field that has been edited
- **Old value:** Current value until the change request is approved
- **New value:** Value filled by the requestor

Workflow Tab

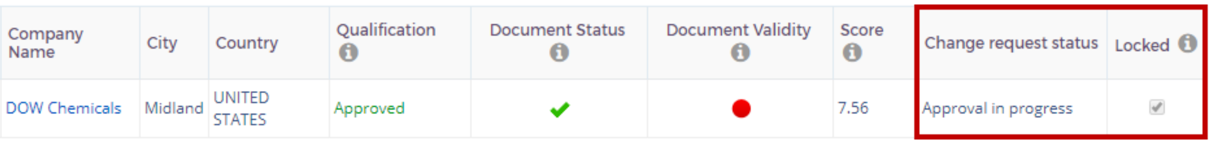
The *Workflow* tab shows the progression of the change request within its approval workflow.

If needed, change request stakeholders can communicate with the requester by writing comments in the *Workflow* tab.



Browse Suppliers Page

When change requests are enabled, two columns dedicated to this feature are displayed in the *Browse Suppliers* page.



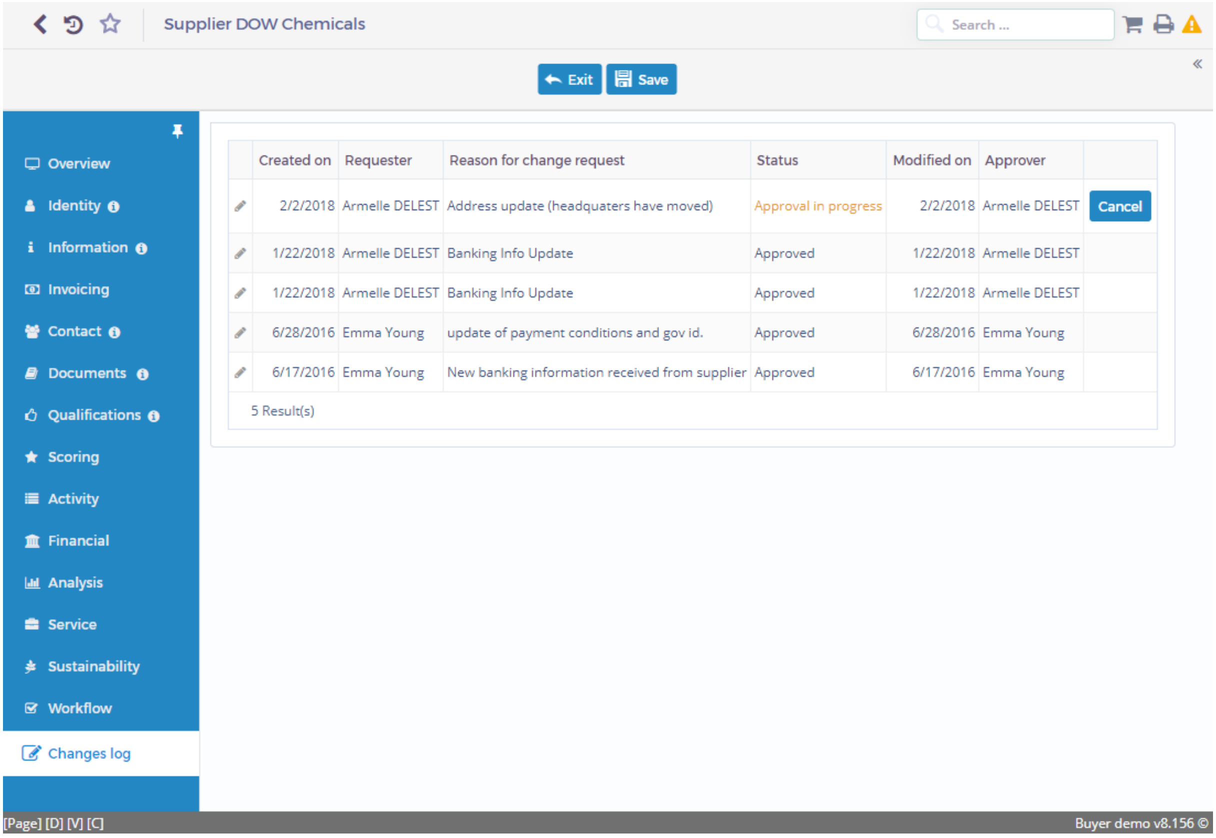
Company Name	City	Country	Qualification	Document Status	Document Validity	Score	Change request status	Locked
DOW Chemicals	Midland	UNITED STATES	Approved	✔	●	7.56	Approval in progress	☑

- **Change request status:** Indicates the supplier change request status, if any. Possible values are:
  - ✓ <u>Initialized:</u> The change request has been created but has not yet been submitted for approval. The Supplier Record is locked.
  - ✓ <u>Approval in progress:</u> The change request has been submitted for approval. The change request becomes read-only for the requester. The Supplier Record is locked.
  - ✓ <u>Approved:</u> The change request has been approved and modifications have been committed to the original Supplier Record (which is now unlocked).
  - ✓ <u>Canceled:</u> The change request has been canceled (the Supplier Record is unlocked).
- **Locked:** Checkbox is checked when a change request is in progress. Supplier data are locked, which means you can’t create a new change request until the current change request is over (approved or canceled).

Ongoing change requests can be instantly retrieved using the *Pending Change Requests* filter.

Supplier Record: Change Request History

The *Changes log* tab of the Supplier Record shows the supplier change request history.



This grid displays the following information:

- : Access to change request detail
- **Created on**: Date when the change request was initiated
- **Requester**: Name of the user that created the change request
- **Reason for change request**: Motive of the change request, refers to the field *Change request reason* populated by the user
- **Status**: Status of the change request
- **Modified on**: Date when the change request was last modified
- **Approver**: Name of the user who approved the change request

Approvers can cancel ongoing change requests by clicking on the **Cancel** button.

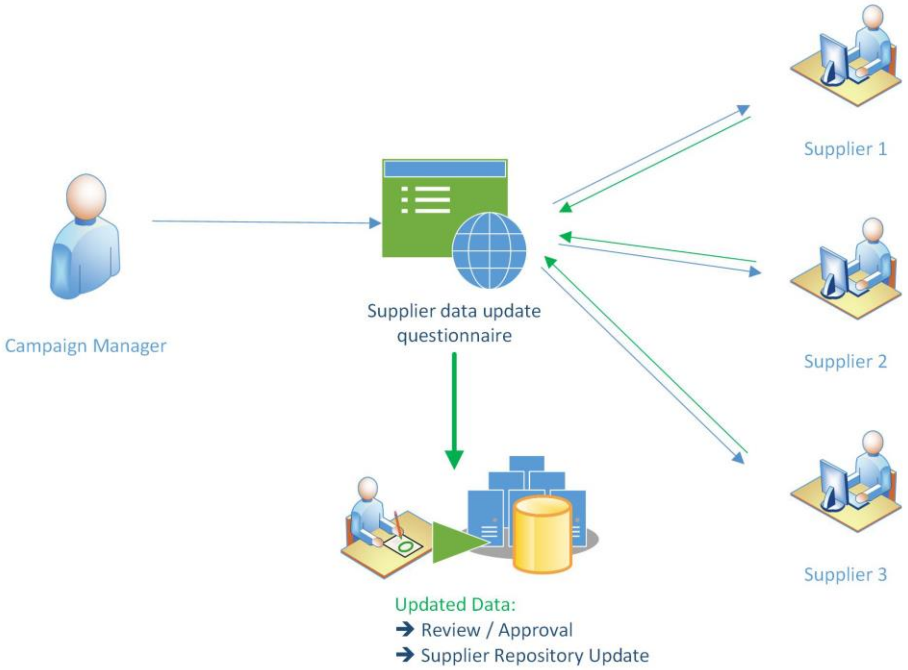
Requesting Information From Suppliers

Information Requests

Information Requests are a tool that lets you collect information from your suppliers.

Depending on your needs, you can include data links to the Supplier Base into your requests, which enables you to conduct supplier data update campaigns.

Supplier data update campaigns are **information collection** processes whereby you invite a selection of your suppliers to provide or update their company data. Field mapping capabilities between the questionnaire and the IVALUA database automate the tasks of prepopulating the questionnaire with known data, and then feeding collected data into the repository.



The steps necessary to conduct an information request campaign are described in this chapter:

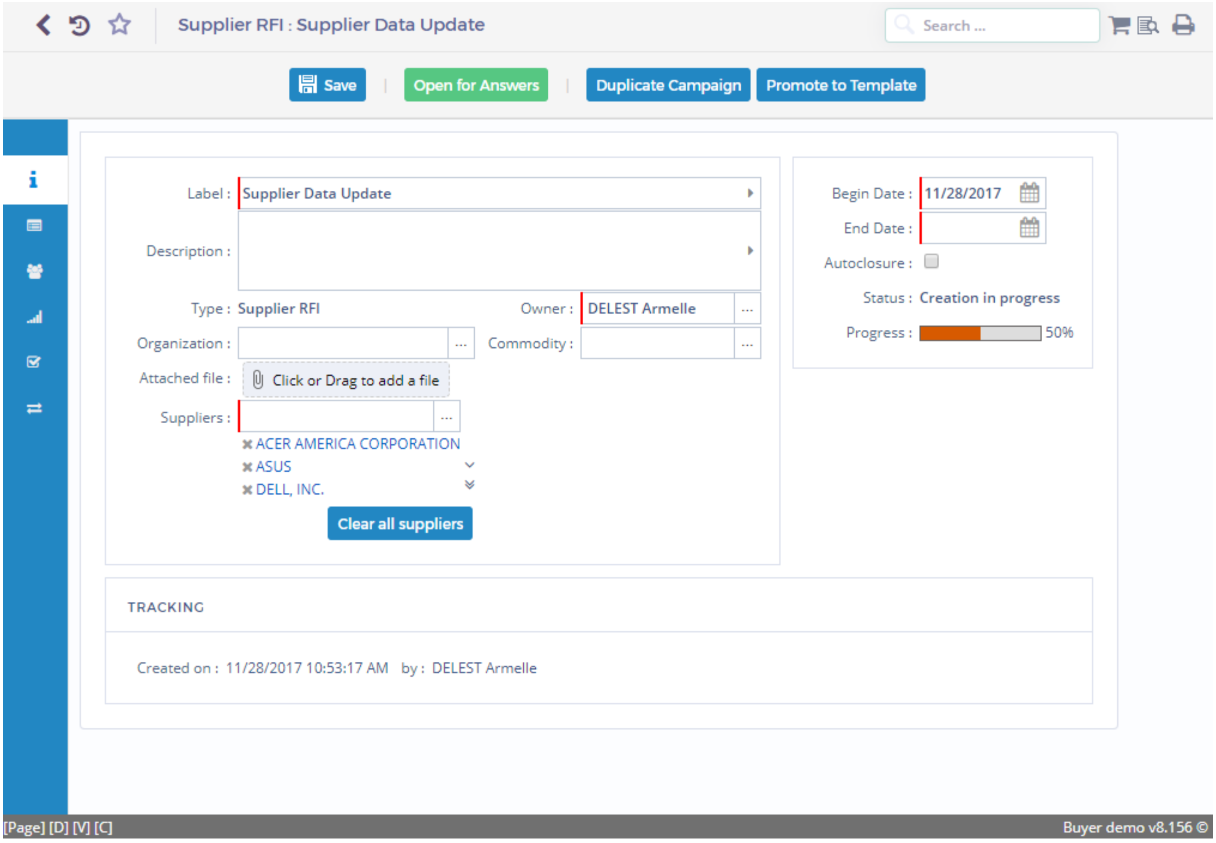
- Selecting suppliers and initiating the campaign (➔p.47)
- Editing the template (➔p.49)
- Inviting suppliers to respond and tracking progress (➔p.63)
- Reviewing supplier answers and updating the Supplier Base (➔p.65)

Selecting Suppliers and Initiating the Campaign

1. Go to the menu Suppliers / Browse Suppliers.
2. Use the search filters to narrow down the list of suppliers, and then select the checkbox of suppliers to be solicited for the campaign.
3. Click **Generate RFI** in the action bar.

   If there is only one template available for supplier data campaigns, this will initiate the campaign;

   If more than one questionnaire template is available, a contextual menu of available templates is displayed: select the desired template to initiate the campaign.



The campaign has the following characteristics:

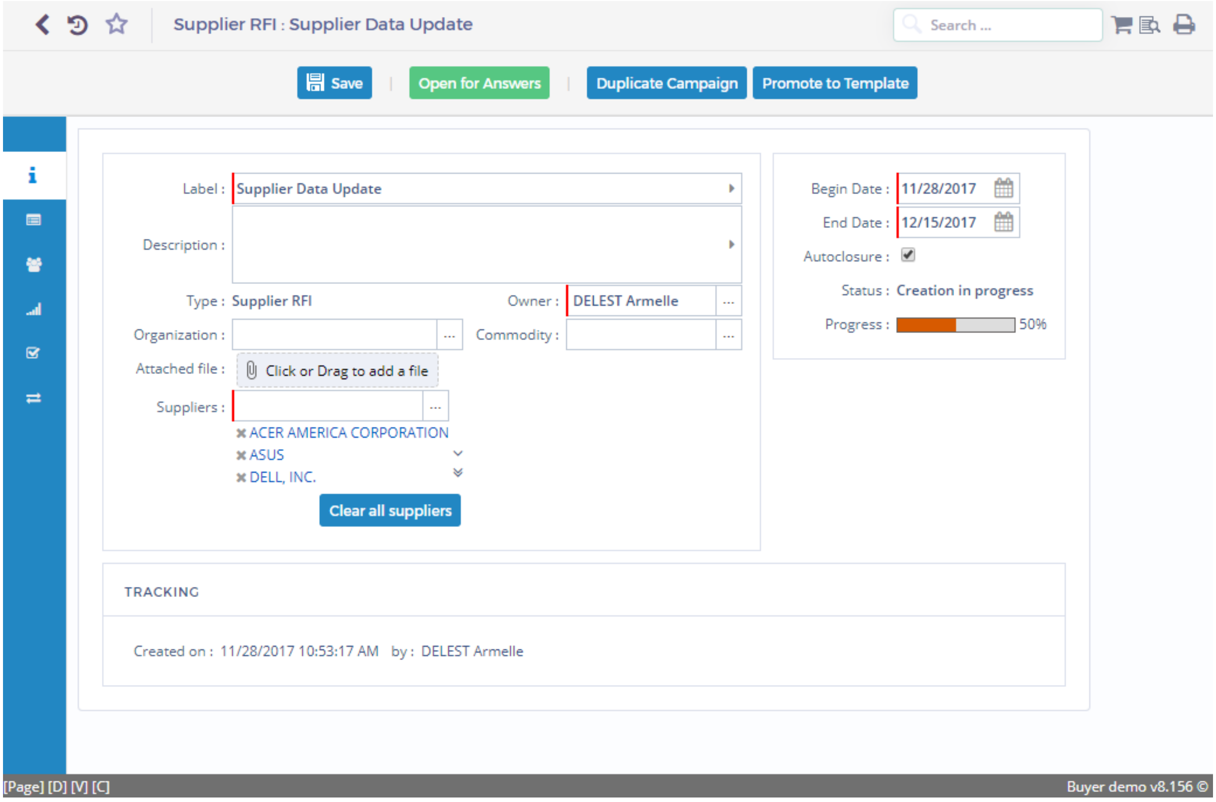
- Its name (field *Label*) is defaulted with the name of the chosen questionnaire template.
- As the creator, you are set as the owner.
- Selected suppliers are listed under the *Suppliers* field.
- The *Begin Date* is set to the current date.

You can change these fields as needed. Other data is read-only:

- Questionnaire type
- Campaign status (set to *Creation in progress*)
- Progress bar. Note that the progress bar indicating the completion of the questionnaire will indicate a percentage other than zero if the chosen questionnaire template contains data links to the Supplier Base and questions have been pre-populated with existing data (more on data links: ➔p.59).

4. Set the *End Date* of the campaign. By default, you need to close the campaign manually. If you want the campaign to be automatically closed upon reaching its end date, select the *Autoclosure* checkbox.

   Note that suppliers may respond until the campaign is closed.
5. Save



At this stage, your campaign:

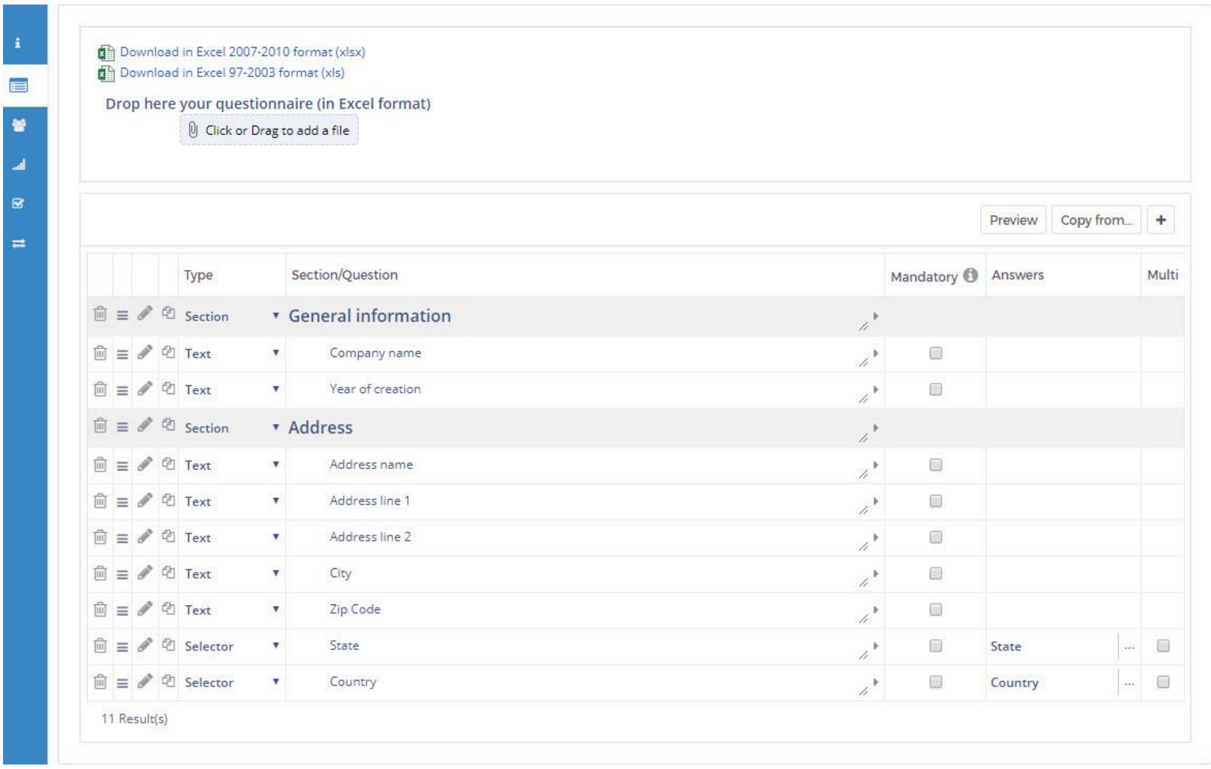
- includes a questionnaire, which you can view by displaying the Questionnaire tab
- may include default respondent assignment rules (if these were set up in the template), which you can view by displaying the Respondents tab

You can use the questionnaire and default respondent assignment rules as is or, if they do not meet your requirements, you can edit them (➔p.49).

Editing the Template

Overview

Your questionnaire is displayed in the *Questionnaire* tab.



A questionnaire is composed of three types of elements: questions, sections and sub-sections. These share a common setup popup window.

This setup window comprises two parts:

- Questionnaire Element: this is where you can display the type of questionnaire element (section, sub-section, or question), the section/sub-section name or question statement, and a description or hints directed to respondents. Additional options depend on the question type.
- Advanced (Constraints): this is used to add conditional behaviors to questionnaires based on respondents' answers.

(for further information on questionnaire settings, see **Settings Reference**, **p.57**).

To view the questionnaire as it will be displayed to respondents, click the **Preview** button.

You can keep your questionnaire as is, or complete it in one of the following ways:

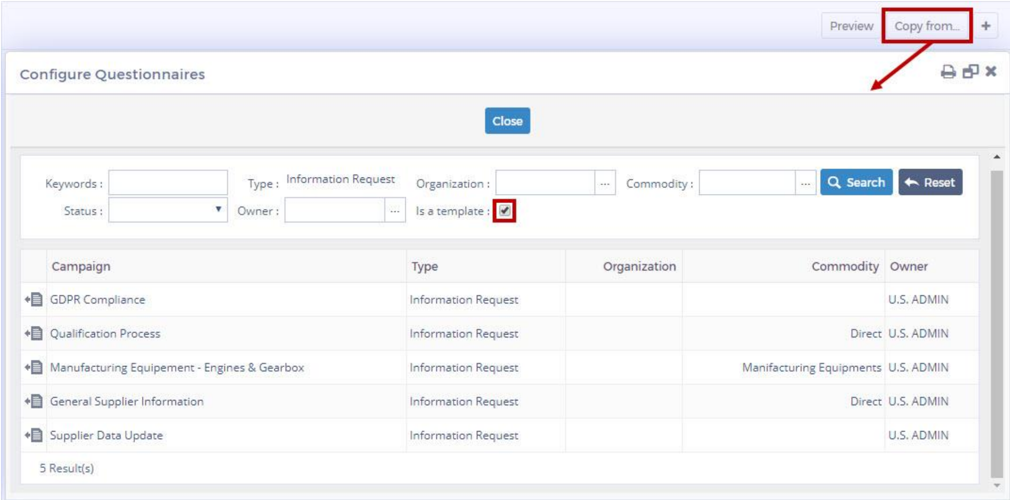
- Copying an existing questionnaire (➔p.50)
- Adding or editing questions, sections, or sub-sections by uploading a Microsoft Excel® file (➔p.51) or using the IVALUA web UI (➔p.55).

Copying an Existing Questionnaire

You can re-use existing questionnaires. Existing questionnaires can either be templates configured by authorized users or questionnaires created in other supplier data update campaigns.

1. Click the **Copy from** button.

   The pop-up window displays the available templates. To display the questionnaires created in other supplier data update campaigns, deselect the **Is a template** filter.



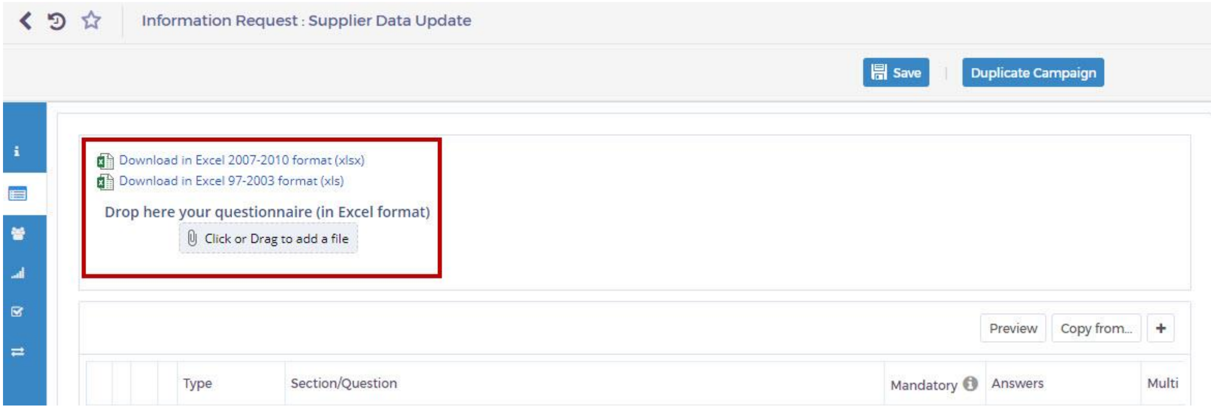
2. Select the desired questionnaire.

   The questions are added to your campaign.

Using a Microsoft Excel® File

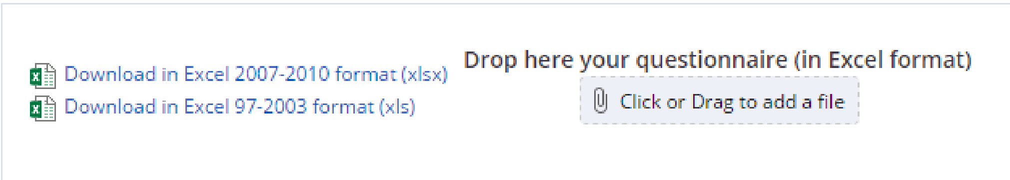
Editing the template questionnaire using Microsoft Excel® involves the following steps:

- Downloading the questionnaire: the purpose of this step is to download a file with existing questions from the template.
- Editing the questionnaire in Microsoft Excel®: You add or edit sections/subsections and questions in the downloaded Microsoft Excel® file.
- Importing the questionnaire: You upload the questionnaire in IVALUA.



Downloading the Questionnaire in Microsoft Excel® Format

1. Display the *Questionnaire* tab.
2. Click the appropriate *Download in Excel Format* option, depending on the Microsoft Excel® version you are using.



The download process will vary depending on the web browser you are using.

3. Save the file to the desired location, and then open it in Microsoft Excel®.

Adding or Editing Sections or Questions to the Microsoft Excel® File

The Microsoft Excel file includes several sheets (tabs):

- An "Instructions" sheet: contains guidance for using the file; we recommend that you peruse this tab
- A "Questions" sheet: contains all the questionnaire sections/subsections and questions
- A "Constraints" sheet that lists conditional behaviors associated with questions

This section will guide you through the creation and editing of questions and constraints.

Questions

An easy way to figure out how to create the various types of sections, subsections, and questions, as well as set related options is to create test questions of each type, and then download the Microsoft Excel file.

	A	B	C	D	E	F	G	H
1	Label	Description / Hints	Type	Display mode (answer)	Selector	Choices for answer	Mandatory Answer	A comment can be added to c
2	**MANDATORY INFORMATION FOR COMMODITY**		**Section**				**No**	**No**
3	*CONTROL*		*Sub Section*				*No*	*No*
4	Do you have an equipped bench test ?		List of values	Buttons		YES=0 NO=0	Yes	No
5	Can you record engine power during test ?		List of values	Buttons		YES=0 NO=0	No	No
6	Can you record emissions during test ?		List of values	Buttons		YES=0 NO=0	No	No
7	Please Describe which chemical element you record		Long text				No	No
8	Can you tune parameters during the test ?		List of values	Buttons		YES=0 NO=0	No	No
9	Please list which parameters can be tune		Long text				No	No
10	Can you record Engine temperature during test ?		List of values	Buttons		YES=0 NO=0	No	No
11	Can you record Gearbox temperature during test ?		List of values	Buttons		YES=0 NO=0	No	No
12	*DOCUMENTATION*		*Sub Section*				*No*	*No*
13	Can you provide complete test report with min/ max values ?		List of values	Buttons		YES=0 NO=0	Yes	No
14	Please describe standard summary of reports		Long text				No	No
15	Can you provide a complete manual for the use of the engine and the gearbox ?		List of values	Buttons		YES=0 NO=0	No	No
16	Select available langage		List of values	Dropdown list		French=0 English=0 German=0 Spanish=0	No	No

The table below describes the import file columns and gives instructions on how to fill them out:

Column	Description
Label	Name of the section/sub-section or actual question (free text)
Description/Hint	Further explanations or instructions to guide respondents
Type	Section, sub-section or question format type. To access available types, click the cell: an arrow will appear to the right of the cell; click the arrow and select a type from the list:
Display mode (answer)	(only if Question Type = List of values) Indicate how you want your choice list to be displayed. Possible values: Buttons, Dropdown list, Checkbox, Radio buttons, Stars
Selector	(only if Question Type = Selector) Name the selector to be displayed (e.g.: State, Country, Incoterm, etc.)
Choices for answer	(only if Question Type = List of values) List possible answers using the following syntax: Value=X, where “Value” stands for a possible answer and “X” is the number of points assigned to that answer (since multiple choice lists are not scored for Information Collection questions, assigned points will all be equal to zero) Example: Yes=0 No=0
Mandatory answer	Possible values: Yes/No “Yes” to set the question as required: respondents will not be able to submit the questionnaire unless they have answered all required questions.
A comment can be added to clarify the answer	Possible values: Yes/No “Yes” to add a comment area that will allow the respondent to attach comments to his response, or “No” to discard the comment area.

Column	***Description***
File can be attached to the answer	Possible values: Yes/No “Yes” to add a file upload area that will allow respondents to attach a file to their response, or else type “No” to discard the file upload area.
Multiples answers allowed	Possible values: Yes/No “Yes” to allow respondents to choose more than one answer to the question
Mapping	Name of the database column the question is mapped to. This mapping enables you to update the IVALUA Supplier Base with data coming directly from suppliers.

Constraints

	A	B	C	D	E	F	G
1	Section	Question	Operator	Value	Section Result	Result	Constraint type
2	MANDATORY INFORMATION FOR COMMODITY	Can you record emissions during test ?	is equal to	YES	MANDATORY INFORMATION FOR COMMODITY	Please Describe which chemical element you record	is visible
3	MANDATORY INFORMATION FOR COMMODITY	Can you tune parameters during the test ?	is equal to	YES	MANDATORY INFORMATION FOR COMMODITY	Please list which parameters can be tuned	is visible
4	MANDATORY INFORMATION FOR COMMODITY	Can you provide complete test report with min/ max values ?	is equal to	YES	MANDATORY INFORMATION FOR COMMODITY	Please describe standard summary of reports	is visible
5	MANDATORY INFORMATION FOR COMMODITY	Can you provide a complete manual for the use of the engine and the gearbox ?	is equal to	YES	MANDATORY INFORMATION FOR COMMODITY	Select available langage	is visible

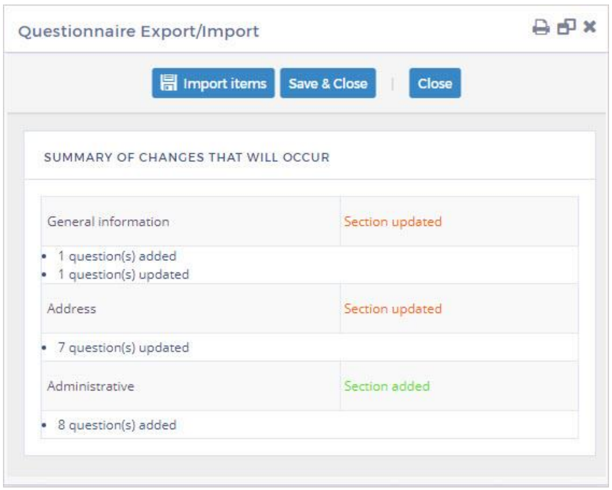
The table below describes the columns from the *Constraints* tab:

Column	***Description***
Section	Name of the section (tab) that contains the question to evaluate
Question	Question whose response will be evaluated
Operator	Comparison operator: *Is equal to, Is not equal to, Contains,* etc. Available operators depend on the type of question.
Value	Value the response will be evaluated against
Section Result	Name of the section (tab) that contains the question affected
Result	Affected question
Constraint type	Behavior if the condition evaluates to true

Uploading the Microsoft Excel® Questionnaire Back Into IVALUA

1. Drop the Microsoft Excel® questionnaire file on the file upload area, or click this area and select the file.

The *Questionnaire Export/Import* window will be displayed. This screen presents a list of found errors and gives a summary of the sections, sub-sections and questions that will be imported.



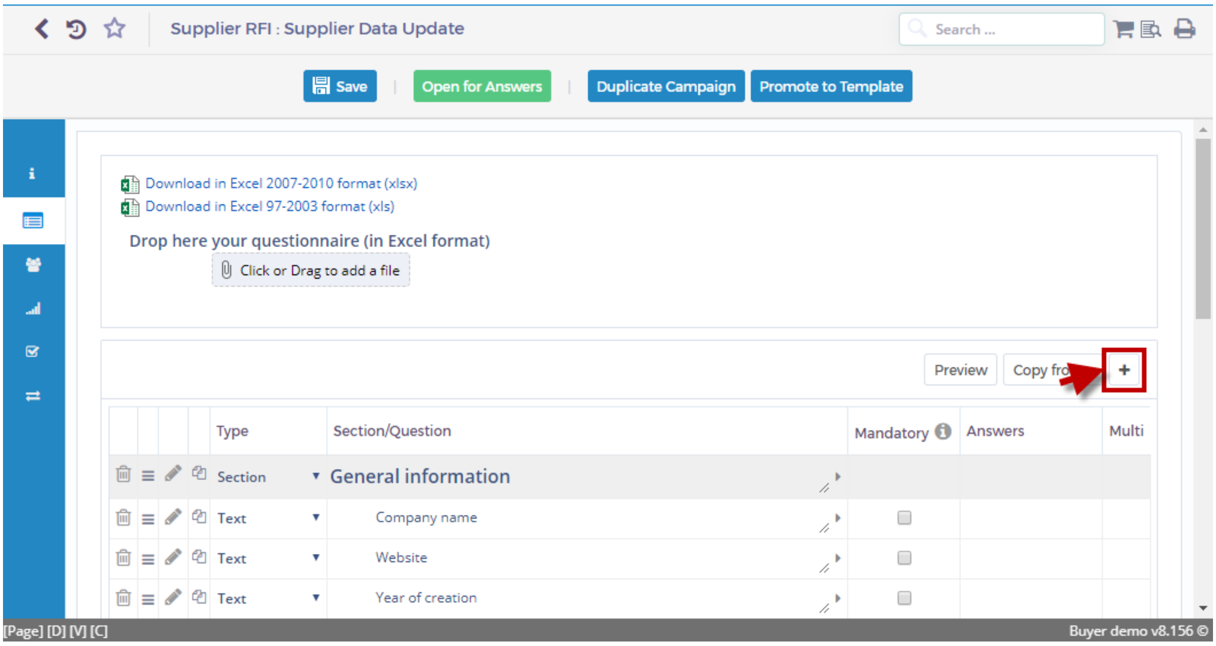
2. Click **Save** to import the questionnaire. A message will indicate that the import was successful.
3. Click **Close** to go back to the *Questionnaire* tab and view imported questions.

Adding and Editing Questions and Sections Using the IVALUA Web UI

Adding a New Question or Section

1. Display the *Questionnaire* tab.

2. To create either a new section, sub-section, or question, use the *Plus Sign* icon .



A new row is added to the question grid below.

3. In the *Type* column, select whether you want to create a section, sub-section, or one of the following question formats: Text, Long Text, Numeric, Date, Attachment, Selector, or List of values.

   In the *Section/Question* column, enter the section/sub-section title or the question statement if it's a question.

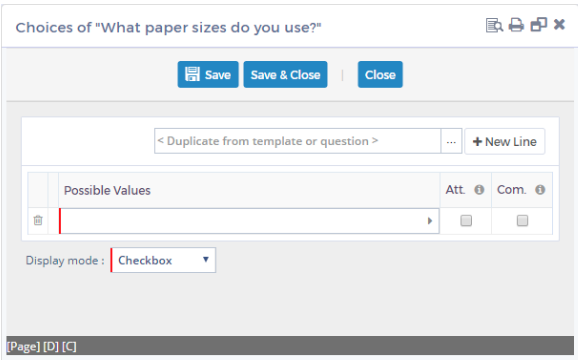
4. Click the **Save** button in the action bar.

5. If it's a question, more settings will become available upon saving, namely the *Mandatory*, *Answers* and *Multi* columns.

   - Use the *Mandatory* column to indicate whether respondents are required to answer the question.
   - Activate the *Multi* checkbox to allow more than one answer.

   If your question is either a selector or a multiple-choice question (list of values), you need to provide further information in the *Answers* column:

   - For a selector, choose the selector to be displayed.
   - For a multiple-choice question, click **Add values** to access a screen that will allow you to create a choice list for possible answers:



To create your answer choice list, you can either:

- ✓ **Select an existing list from the choice list selector** (labeled *Duplicate from template or question*): this selector allows you to copy a choice list from another question in the current questionnaire or from a template, or
- ✓ **Enter each answer choice** in the *Possible Values* column (using the **New line** button to add new rows).

Choose how you want possible answers to be displayed from the *Display Mode* drop-down list.

Save & close.

6. Information Collection questionnaires allow you to set up conditional behaviors based on respondent's answers.

Possible conditional behaviors include the ability to skip or display questions and the ability to set a question, a comment, or a file attachment as required, all based on respondents' answers.

To set up such a behavior, go to the *Advanced* section of question settings.

Conditional behaviors always involve two questions: the question whose response is being evaluated and the question that will be affected if the condition is met.

You can set up the desired conditional behavior from either of the two questions involved, using either of the sections *Constraint TO this question* or *Constraint FROM this question*:

- **Constraint TO this question:** The current question is the affected question, in other words, the question that will show the result of the condition being met
- **Constraint FROM this question:** The current question is the question whose response will be evaluated to induce a result

Let's illustrate this with a simple example. Let's imagine you want to ask your suppliers whether they provide a manual and, if so, to specify the available languages for the manual.

Q14 – Do you provide a manual?

Q15 – Select languages.

You want to display Q15 only if the answer to Q14 is YES.

If you set up the conditional behavior in Q14, you will create a FROM constraint like so:

If you set up the conditional behavior in Q15, you will create a TO constraint like so:

Whichever way you choose to set it up, the constraint is mirrored in the other question involved.

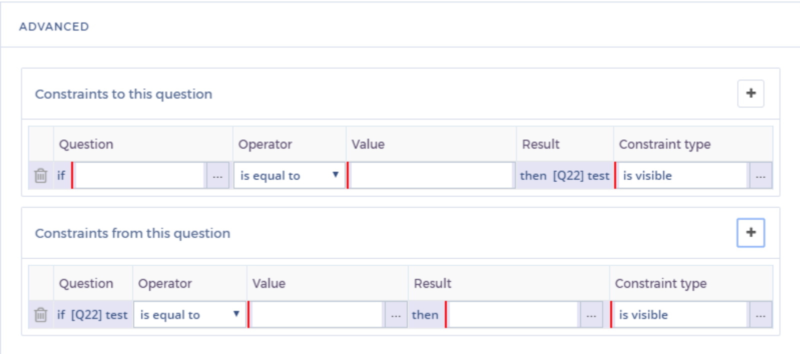
Other Operations on Questions or Sections

Each row in the questionnaire is associated with a set of icons, which allow you to perform the following actions:

Icon	*Description*
	Delete a row
	Move a question up or down (click and drag)
	Edit the settings of a question, sub-section, or section
	Duplicate a question

Settings Reference

Column	*Description*
Questionnaire Element	
Type	Question format type
Label	Question statement or section/sub-section title
Description / Hints	Clarification or guidance instruction on how to respond
(File attachment control)	Use this control to attach a file for respondents to review
Mandatory Answer	Answering questions is optional unless you enable this option.
A comment can be added to clarify the answer	Select this check box to allow respondents to include additional explanations with their answer.
Multiple answers allowed	Select this check box to allow respondents to select more than one answer.
File can be attached to the answer	Enable this option to allow respondents to include a file attachment with their answer
Linked with the field	Use this field to link the question to an IVALUA database field. This is useful to prepopulate known data and to update the Supplier Base with collected information. See also: *Managing Data Links With the Database*, on p.59
Questionnaire Element	***'List of values' question type only***
Duplicate from template or question	Use this selector to select a predefined answer choice list. The answer choices of the selected list are listed in the *Possible Values* grid.
+ New Line	When entering answer choices manually, use this button to add a new answer choice.
Possible Values	Answer choice
Att.	Enable this option to require respondents to attach a file if they select this answer

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Com.</td><td>Enable this option to require respondents to include a comment if they select this answer</td></tr>
<tr><td>Display Mode</td><td>Select the format you want answer choices to be displayed in</td></tr>
<tr><td>Advanced</td><td></td></tr>
<tr><td>Constraints TO this question / Constraint FROM this question</td><td>


Use this section to add conditional behavior based on respondents’ answers (skip logic, setting a question, a comment or a file attachment as required).
Constraint TO this question ➔ Current question is the affected question, in other words, the question that will show the result of the condition being met
Constraint FROM this question ➔ Current question is the question whose response will be evaluated to induce a result
</td></tr>
<tr><td>Question</td><td>Question whose response will be evaluated</td></tr>
<tr><td>Operator</td><td>Comparison operator: Is equal to, Is not equal to, Contains, etc.
Available operators depend on the type of question.</td></tr>
<tr><td>Value</td><td>Value the response will be evaluated against</td></tr>
<tr><td>Result</td><td>Affected question</td></tr>
<tr><td>Constraint type</td><td>Behavior if the condition evaluates to true</td></tr>
</table>

Managing Data Links With the Database

Data links are used for prepopulating the questionnaire that is sent out to solicited suppliers with known data and for updating the Supplier Base with suppliers' answers.

Principle

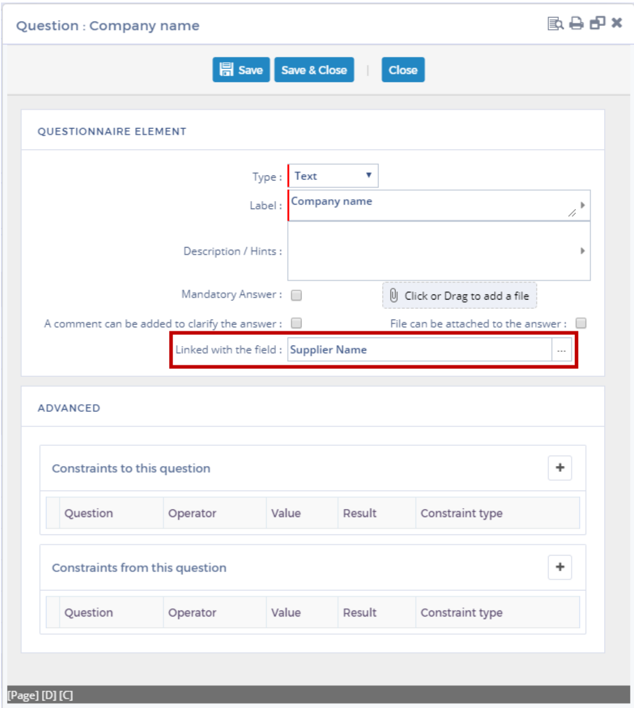
Each RFI question can be tied to a Supplier Base field.

Data links are bidirectional:

- Base ➔ Questionnaire: the link is used for prepopulating the questionnaire with existing data from the Supplier Base.
- Questionnaire ➔ Base: the link is used for updating the Supplier Base with suppliers' responses to the questionnaire.

Creating or Editing Data Links

1. Open the question you wish to link to the database.
2. Using the *Linked with the field* selector, select the Supplier Base field you wish to link it to.

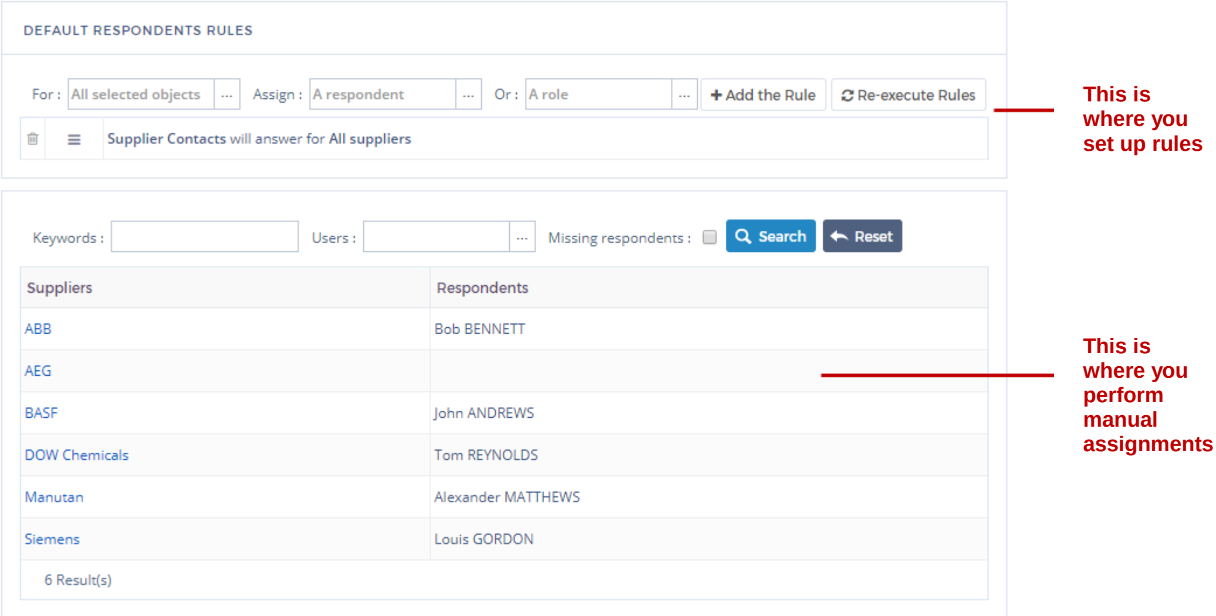


3. Save and close.

Assigning Respondents

Overview

Respondents can be assigned either using rules or manually. When you have a lot of assignments to do, a good practice is to use rules to cover most cases, and then to handle manually any supplier for whom the rules did not bring up any respondent.



The campaign template can include default respondent assignment rules. If so, you can use those rules or create new ones. If the campaign template does not include any rule, then you should create your own.

Once assignment rules are applied, make sure every supplier has been assigned a respondent and fill out any missing respondent (➔p.62).

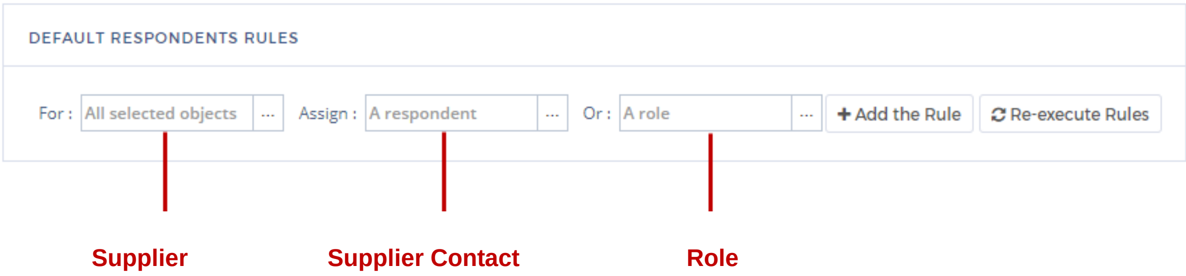
Creating Respondent Assignment Rules

Before You Begin

When creating assignment rules, you need to be aware of the following points:

- There can be only one respondent per supplier.
- You can define multiple respondent rules. The rules will be applied in the order they are defined until a respondent is found for each supplier (only one respondent will be selected in the end).
- Respondents can be assigned by name or by role.
  In the first case, you select the specific user who will respond. This requires you to know the user by name.
  In the second case, you select a role and the system finds the relevant users. In the context of information requests to suppliers, only the *Supplier Contacts* role is relevant. It returns the list of all the contacts declared for each supplier. The system assigns the first contact found for each supplier.

Creating a New Rule



Assignment by name:

1. Select a supplier.
2. Select a supplier contact.
3. Click Add the Rule.

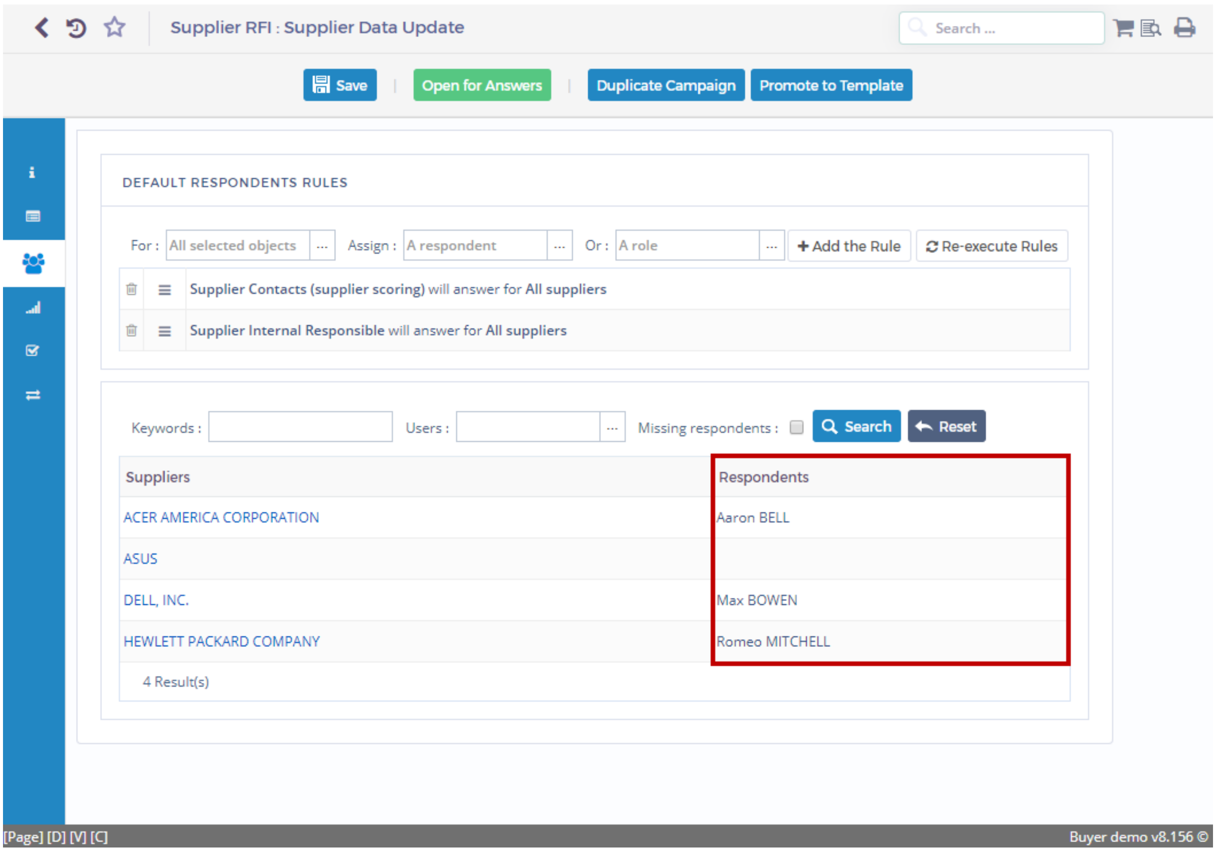
Assignment by rule:

1. (Optional) Select a supplier only if you want to limit the rule to a given supplier. Leave this blank to apply the rule to all suppliers.
2. Select a role.
3. Click **Add the Rule** to create the rule.

If you have multiple rules, you can reorder them by hovering your mouse pointer over the icon ☰, and then dragging the rule to the desired position.

Rules are applied as they are created.

The names of assigned respondents are displayed in the Suppliers/Respondents grid located below respondent rules.

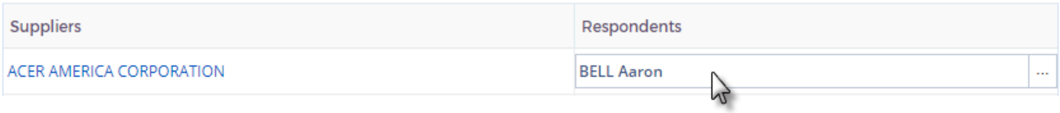


Filling In Missing Respondents

In the Suppliers/Respondents grid, you can spot missing respondents either by scanning through the list or, if you have a long list of suppliers, by selecting the *Missing Respondents* filter, and then clicking **Search**.

For these suppliers without respondent, you can click the supplier name to access the Supplier Record and create a supplier contact (*Contacts* tab).

For suppliers with multiple contacts, you can change the respondent assigned by a rule to another of the supplier's contacts by clicking directly in the respondent cell and using the selector that appears.



Inviting Supplier Contacts to Respond and Managing the Ongoing Campaign

Inviting Supplier Contacts to Respond

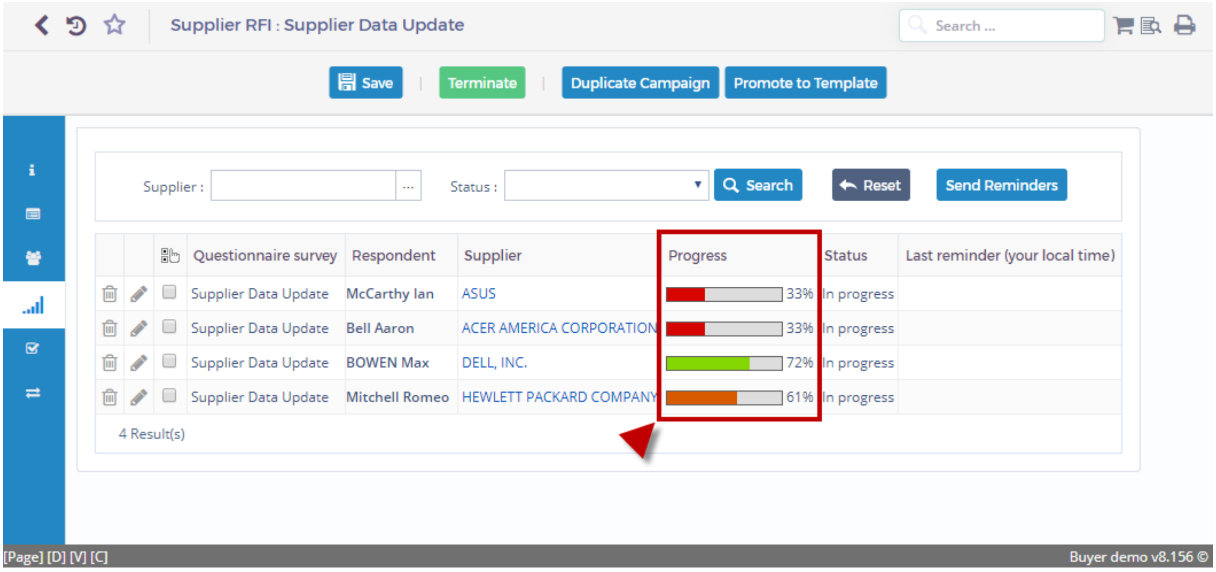
Click **Open for Answers**.

Solicited supplier contacts will receive an email notification inviting them to respond. The email notification includes a clickable link to the questionnaire.

Tracking Progress

You can monitor completion of the campaign on the *Answers* tab.

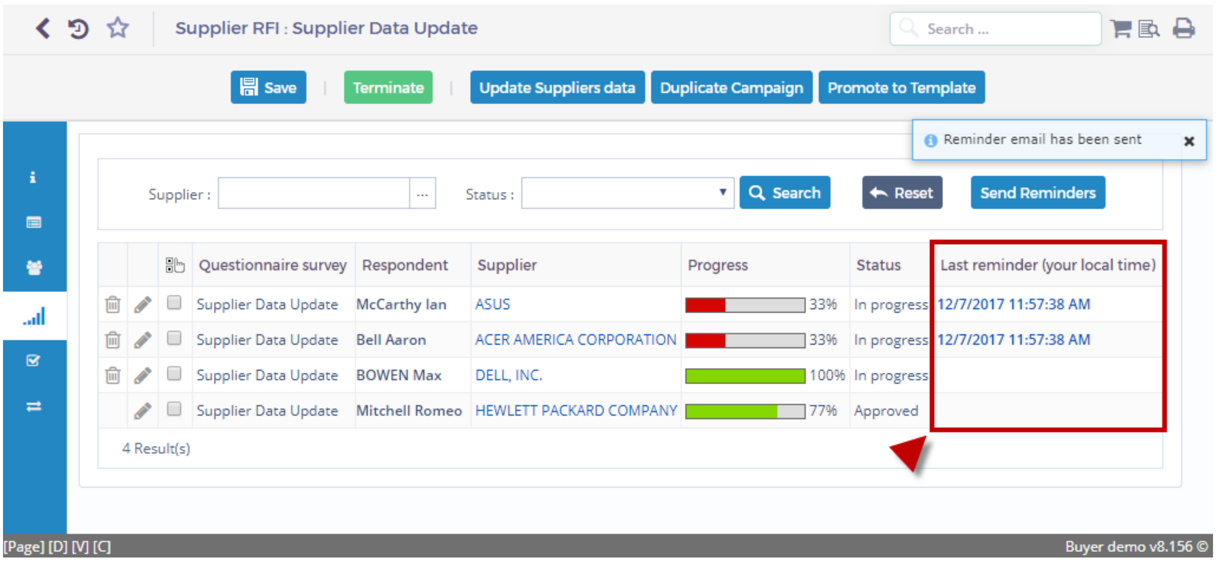
Note that progress rates account for data that is prepopulated directly from the Supplier Base using data links between questions and supplier base fields.



Sending a Reminder to Late Respondents

On the *Answers* tab, select the check box of the respondents you wish to send a reminder to, and then click **Send Reminders**. Selected respondents will receive an email notification.

The date and time the reminder is sent is logged in the *Last reminder* column.



Adding Suppliers to an Ongoing Campaign

As long as the campaign is not closed, you can add suppliers to it.

1. Display the *Gen. Info* tab.
2. Use the *Suppliers* selector to add suppliers.
3. Click **Save**.
4. Display the *Respondents* tab and assign a respondent to each supplier you've added. If using a role rule, click **Re-execute** to re-run the rule for new suppliers.
5. Click **Open New Forms** to invite new suppliers to respond.

Canceling an Information Request Campaign

To cancel an on-going information request campaign, click **Terminate** in the action bar.

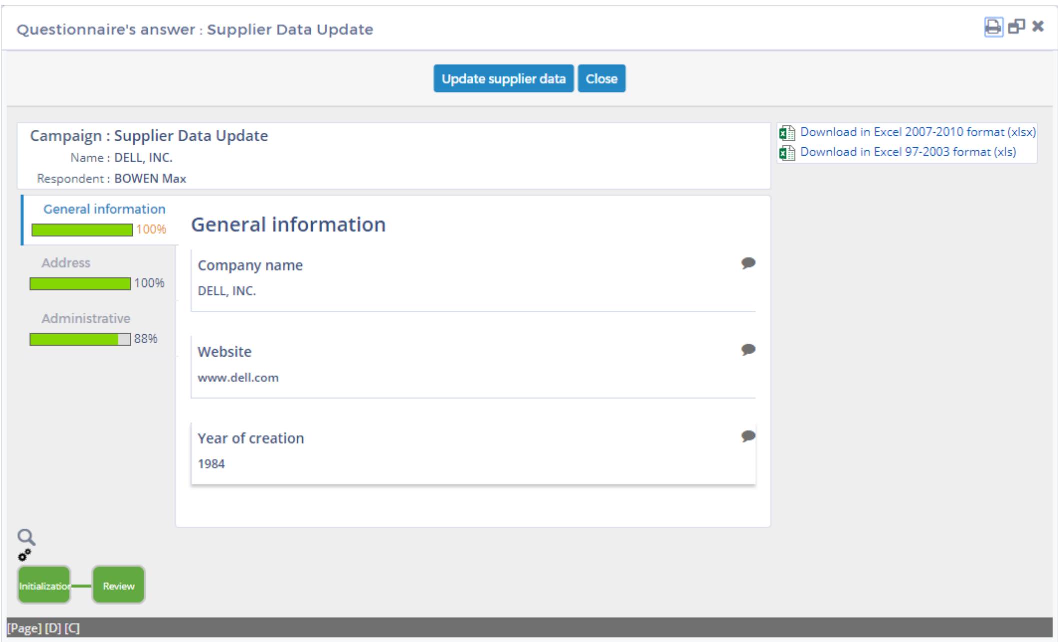
All the questionnaires that have not yet been submitted will be canceled.

Reviewing Answers and Updating the Supplier Base

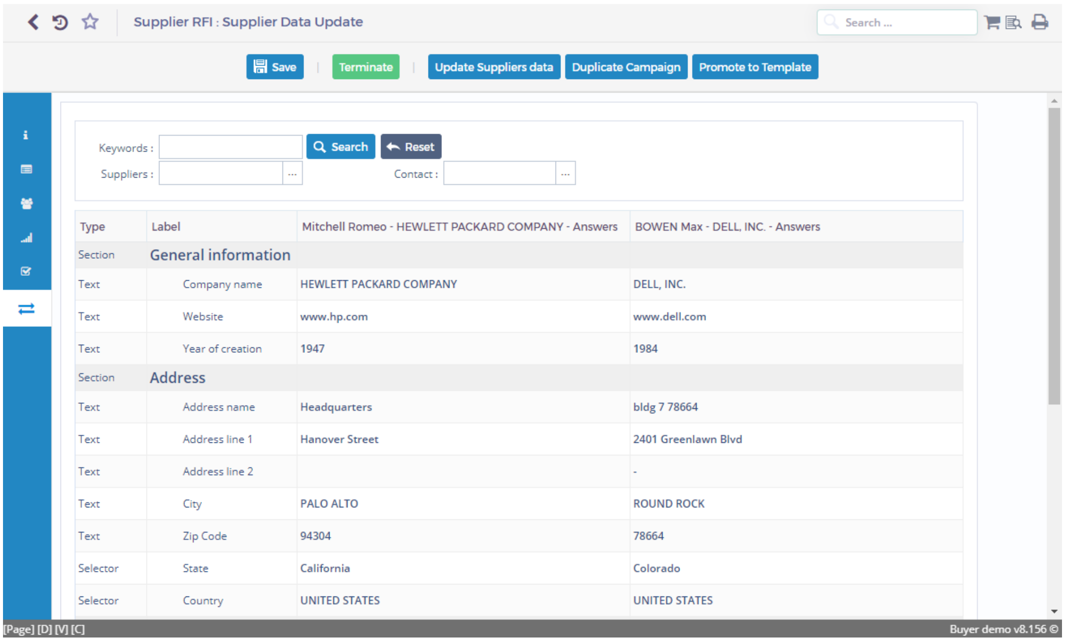
Reviewing and Approving Answers

As soon as respondents submit their completed questionnaire, you receive a notification and you can review their answers in the *Answers* and *Comparison* tabs.

On the *Answers* tab, use the *Edit* icon to access an individual respondent's response.



To view a side-by-side comparison table of all respondents' answers, display the *Comparison* tab.



If something is unclear or incomplete in a supplier contact's response, you can send the questionnaire back to the respondent for clarification or elaboration. To do so, use the **Send Back to Respondent** button in the response screen

If all is fine, click **Approve**. Approved data can be used to update the Supplier Base.

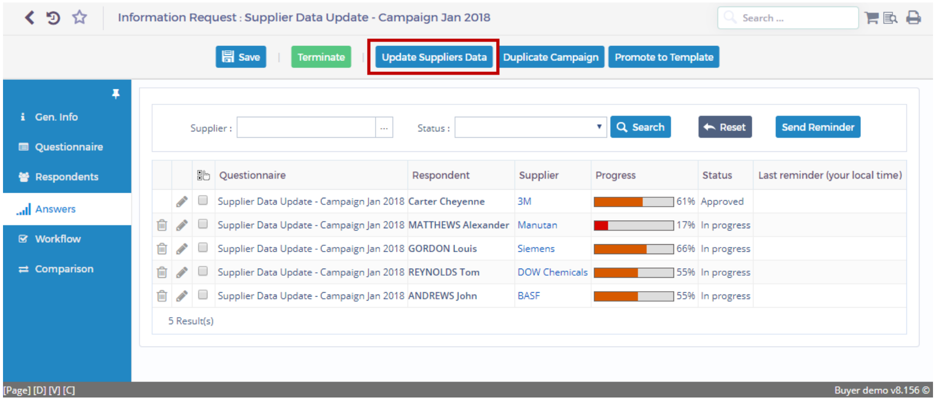
Updating the Supplier Base

If the questionnaire includes data links to the Supplier Base, you can update supplier data with respondents' answers.

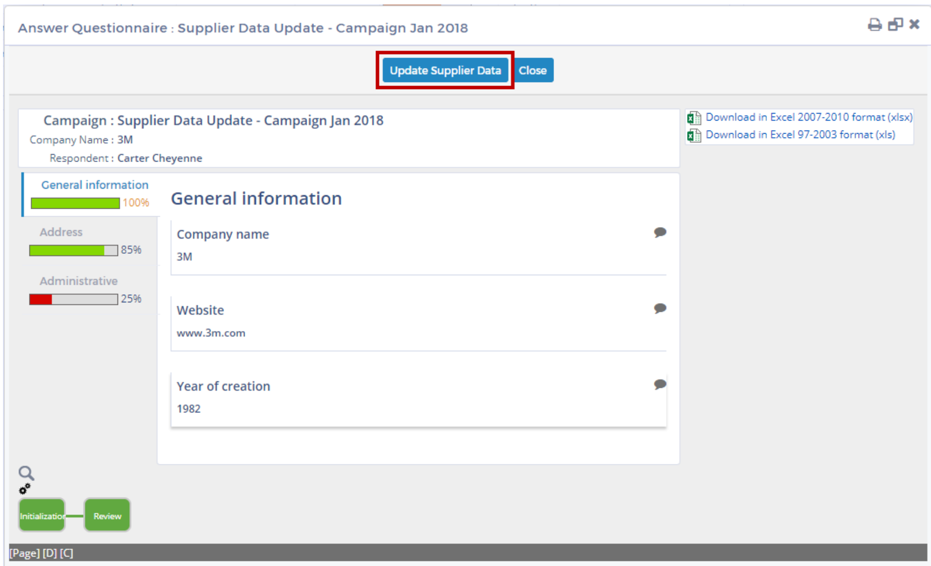
Supplier Base update functions become available when at least one questionnaire is in the Approved status.

Update functions can be accessed from two different locations in the application:

- By clicking the **Update Supplier Data** button in the main action bar, you can access the approved answers of all suppliers.

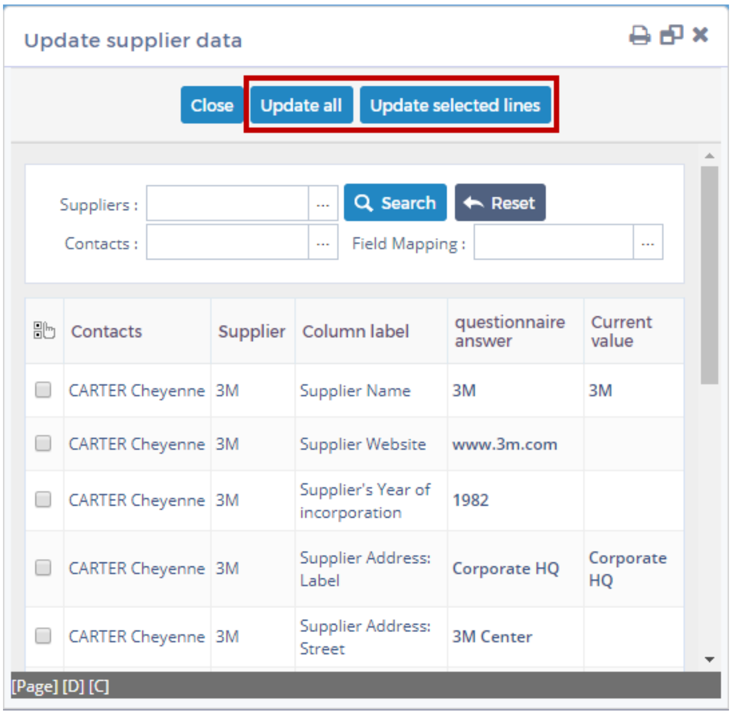


- By clicking the **Update Supplier Data** button in each supplier's response (*Answers* tab + *Edit* icon), you can access the approved answers of the current supplier.



Once in the *Update Supplier Data* dialog box:

- To update all the listed data, click **Update All**.
- To update a selection of fields, select the checkbox of the desired fields, and then click **Update Selected Lines**.



Managing duplicate supplier records

Simple Merge of Two Supplier Records With Transfer of Operational Objects

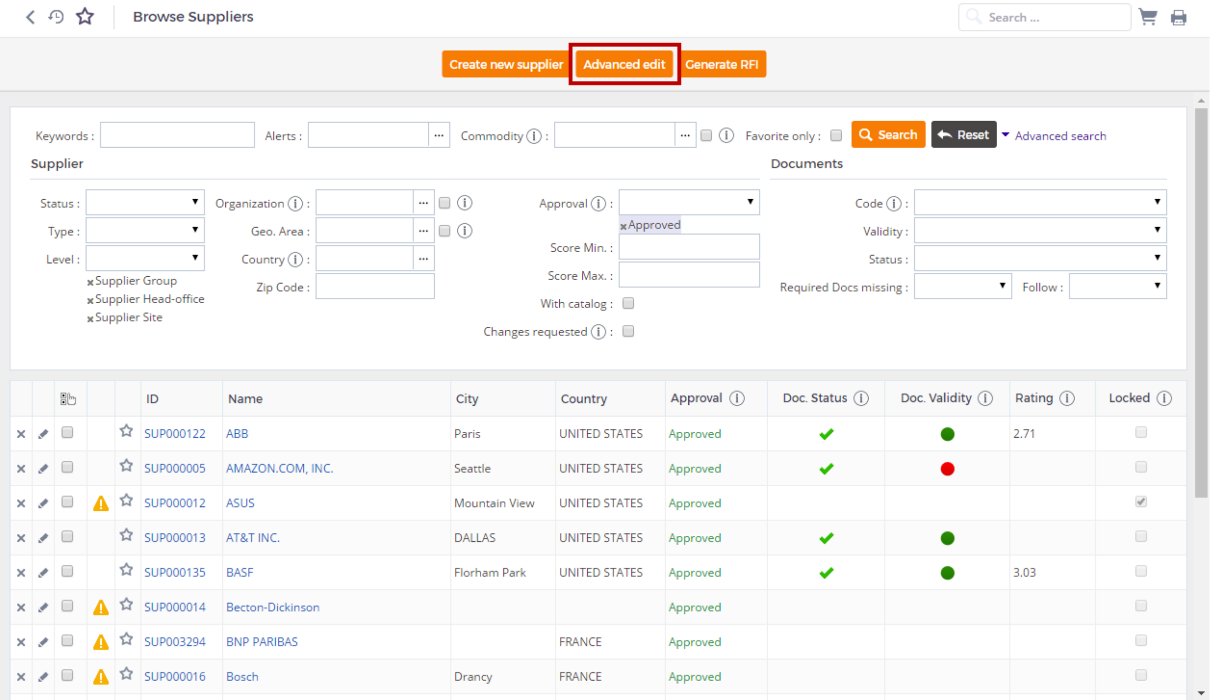
Purpose of the Merge Function

This merge function will trigger the following actions:

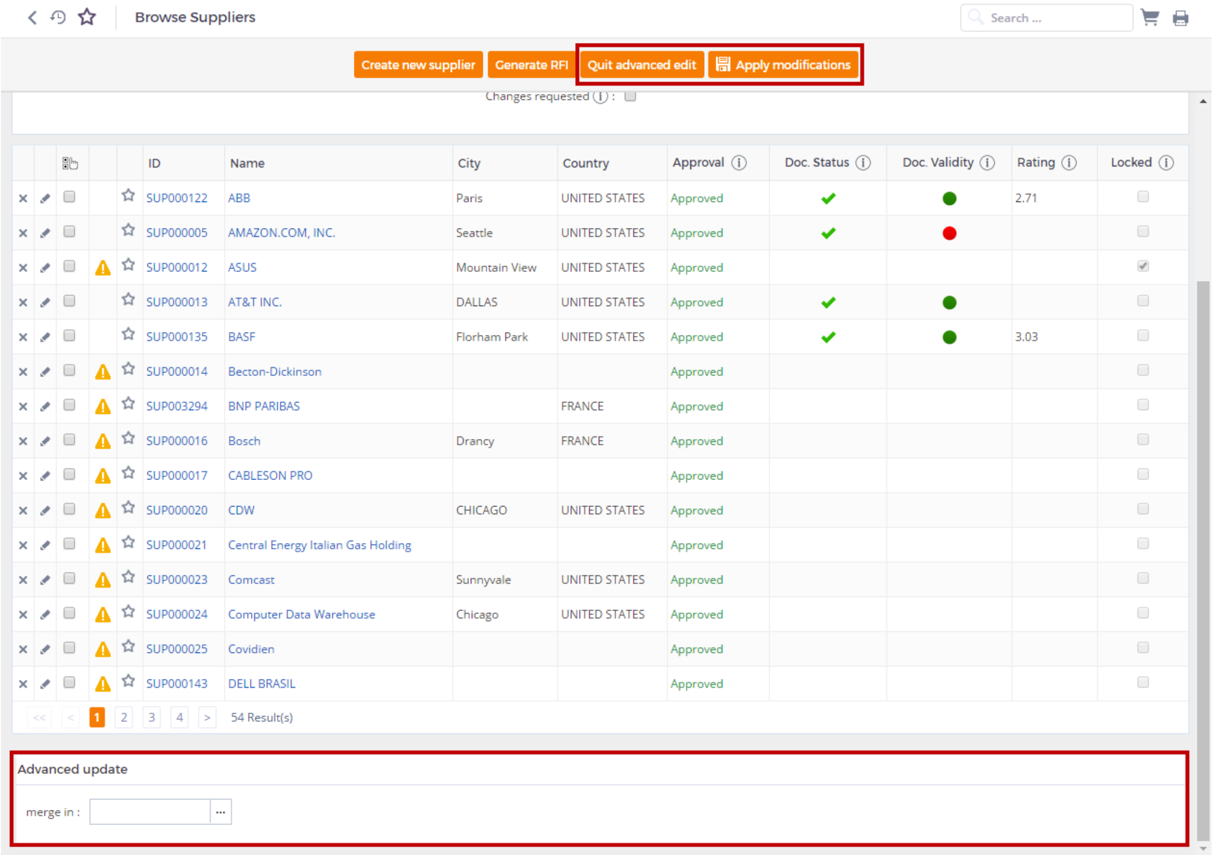
- Source supplier will be deleted.
- The operational objects of the source supplier (contracts, items, purchase requisitions, orders, invoices, etc.) will be transferred to the target supplier.

Accessing the Merge Function

1. Open the Supplier browse page.
2. Click the *Advanced edit* button available at the top of the page (specific authorization is required), and then scroll down the page.



The *Advanced update* area has now appeared below the supplier list, as well as new action buttons relating to this feature.



Merging Two Supplier Records

1. In the Supplier List, select the checkbox of the supplier you wish to delete (source supplier).
2. In the *Advanced update* area, select the supplier you wish to retain in the database (target supplier). To do so, click the *Selector* button placed next to the *Merge in* field; in the window that appears, select the desired item by clicking its *Select* icon.
3. Click the Apply modifications button.

   The first record is set to the *Deleted* status.

   The following items of the deleted record (source) will be merged in the target supplier:

   - Objects from the eProcurement life cycle (Purchase requisitions, purchase orders, receipts, invoices)
   - Sourcing projects
   - Contracts
   - Catalogs
   - Documents
   - Contacts
   - Supplier third party accounts
   - Structure
   - Workflow actions
   - Transcodifications

Advanced Deduplication of Supplier Records

Purpose of the Deduplication Function

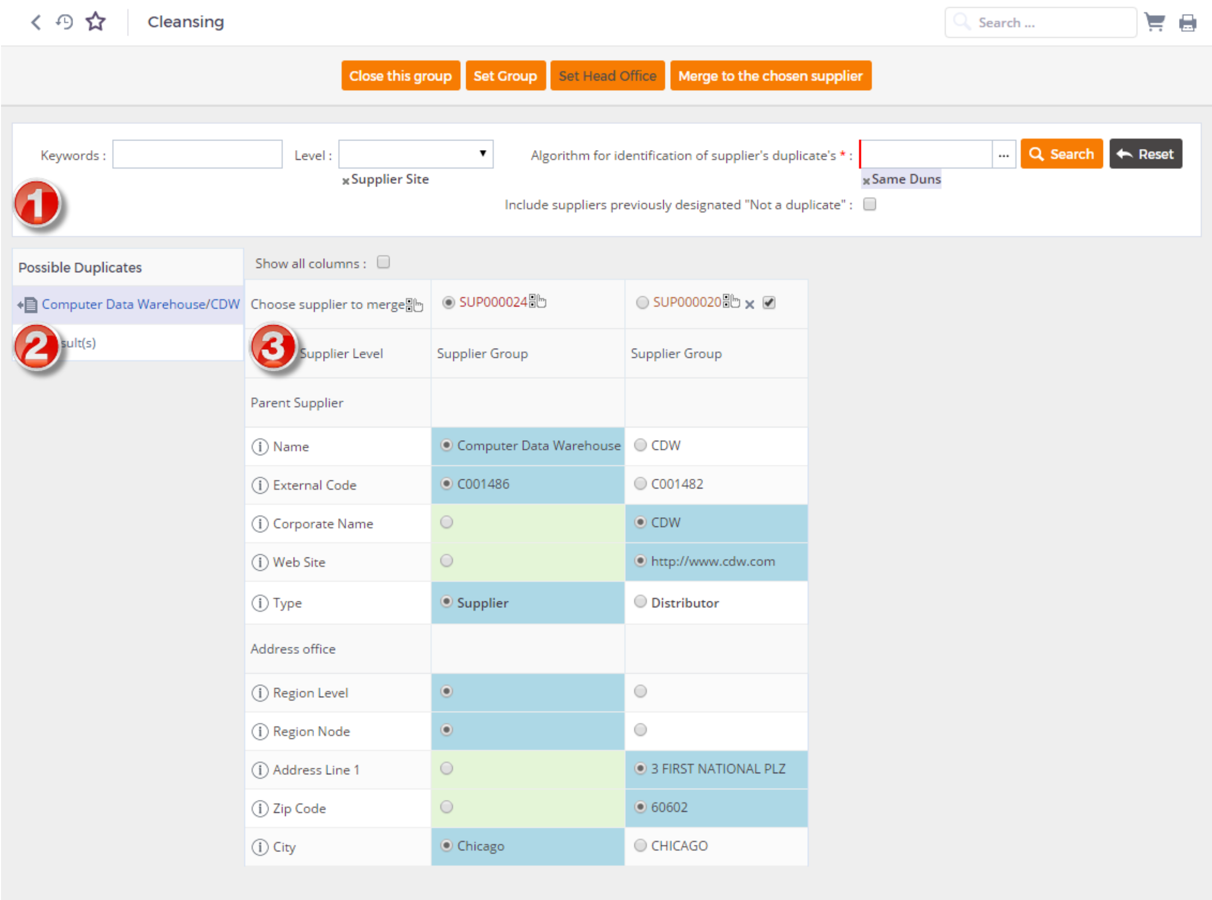
This advanced deduplication function aims at identifying duplicates that originate from spend data imports and allows for a precise control over the supplier hierarchy and data.

Accessing the Deduplication Function

Select the *Suppliers / Cleansing* menu.

Getting Familiar With the User Interface

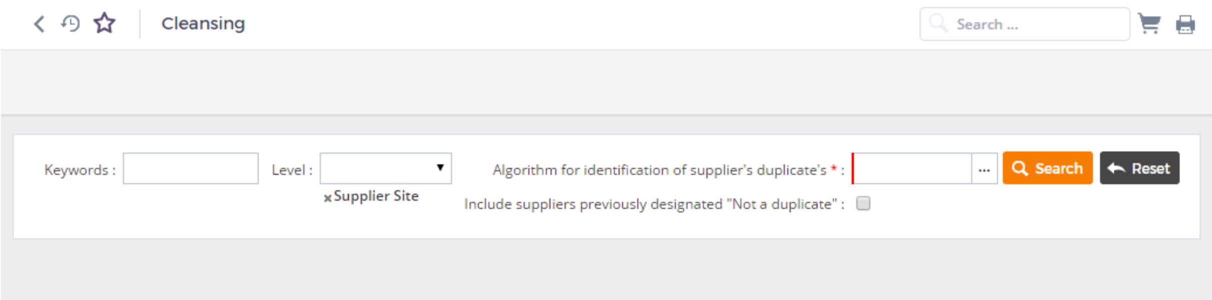
The *Cleansing* page has 3 main parts:



1. Search filters area (➔Identifying duplicates, p.71)
2. Possible duplicate sets (according to selected search filters)
3. Detail of the selected duplicate set (➔Processing duplicates, p.72)

Identifying Duplicates

The *Cleansing* page allows you to search for duplicates.

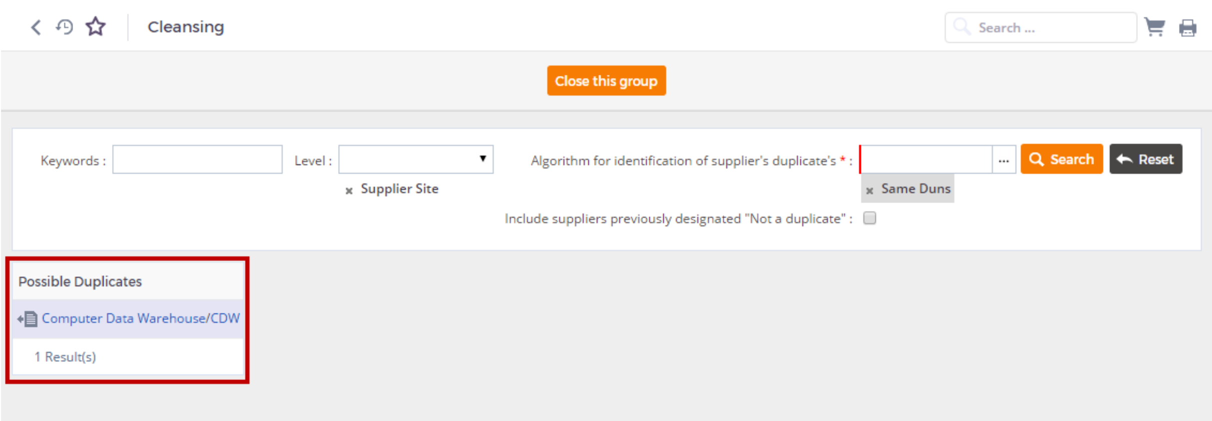


To perform a search:

1. Define your search filters:

Filter	*Description*
Keywords	Keywords for narrowing down your search (by default, the keywords will be searched on the supplier name)
Level	Supplier levels you wish to search for duplicates (for instance, if you want to de-duplicate suppliers imported from your ERPs against existing sites in the IVALUA Supplier Base, select levels “Supplier ERP” and “Supplier site”)
Algorithm for identification of supplier duplicates	Several predefined algorithms are provided for you to search duplicates (on all or part of the supplier name, on their address, on their DUNS id, etc.). Please note: ▪ It is possible to create new algorithms (Administrator or Developer). ▪ In relation to algorithms for searching same supplier names, the Administrator has the ability to define keywords to be ignored (for instance, you may want to exclude “inc” so that supplier records whose name only differ by this keyword can still be brought up as duplicates).
Include suppliers previously designated "Not a duplicate"	Select to display the suppliers that were previously marked as not being duplicates in the duplicate set detail area

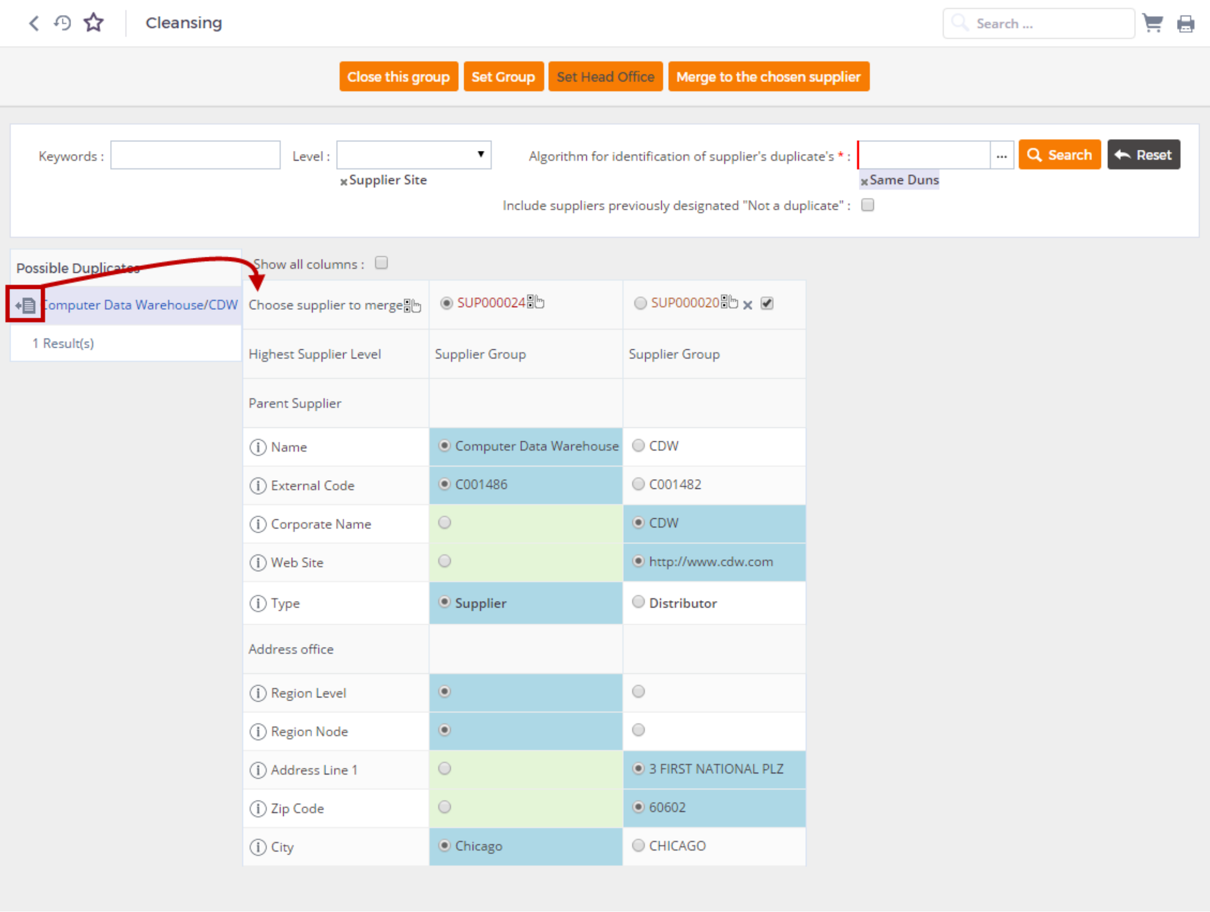
2. Click **Search**. The list of found duplicate sets will be displayed underneath the search filters area.



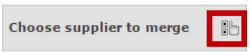
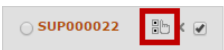
Processing Duplicate Sets

Showing the Detail of a Duplicate Set

In the list of found duplicate sets, click the selection icon of a duplicate set to show the detail of concerned suppliers.



In the detail area, the following controls are available:

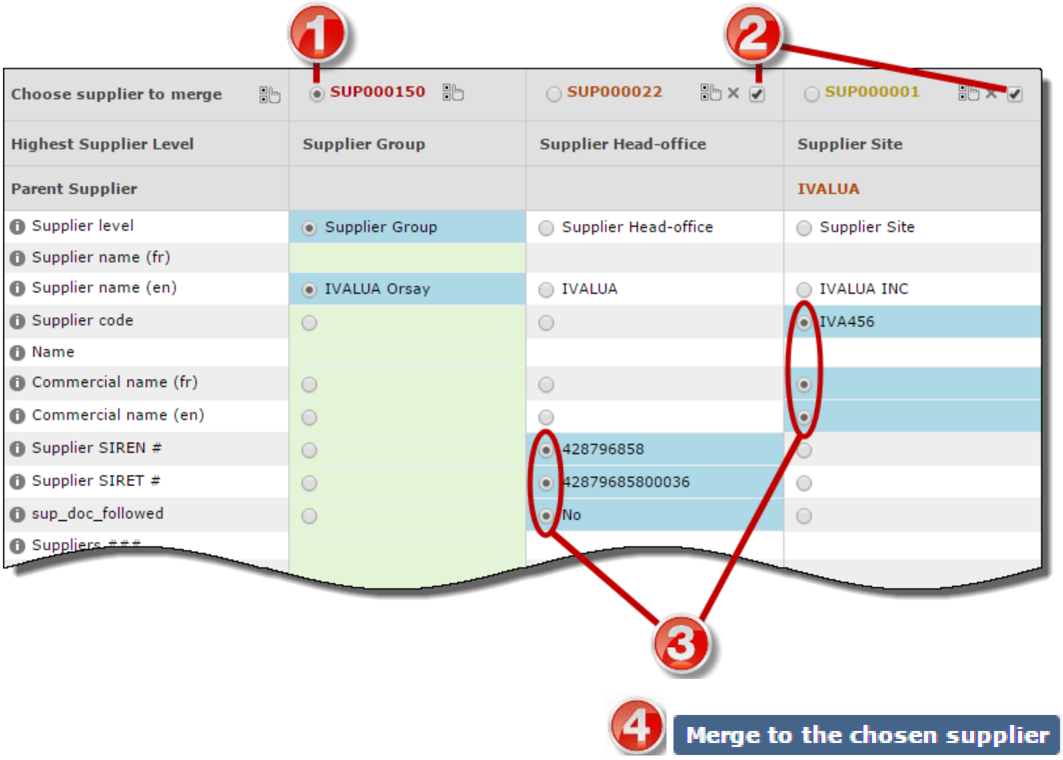
Control	*Description*
Show all columns	Display more supplier data
	 Select the checkboxes of all suppliers  Select all the data of this supplier (column)
✕	Mark the supplier as “not a duplicate”: it will be removed from the duplicate set. In case of error, or if for any reason you need to view that supplier again in the duplicate set, you can make it show by selecting the search filter *Include suppliers previously designated "Not a duplicate".*
☑	Select a supplier as the source supplier to be merged (➔p.73) or select a supplier you want to assign the “Group” or “Head Office” level to (➔p.74)

Merging Suppliers

What happens when you merge 2 suppliers?

Merging a source supplier into a target supplier will trigger the following actions:

- The source supplier will not be deleted: instead, the ERP level will be assigned to it, while all other levels that the source supplier may have had will be transferred to the target supplier.
- The source supplier will be attached to the target supplier (which becomes its parent).



1. Select the target supplier.
2. Select the source supplier(s).

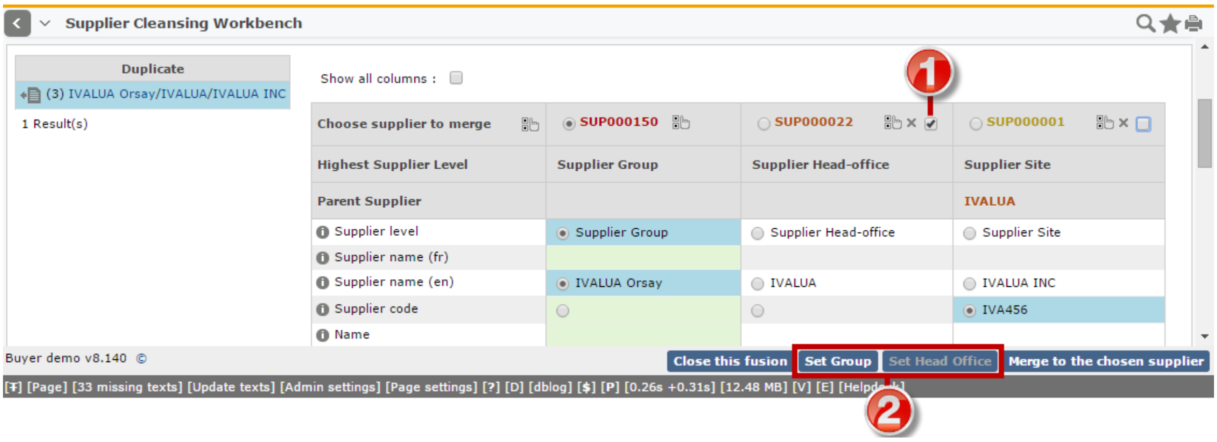
   Deselect the suppliers you do not want to merge (to remove these from the duplicate set, you can click their icon *Not a duplicate* ✕).
3. Select the data of the source suppliers to be merged into the target supplier.
4. Click the button Merge to the chosen supplier.

Redefining a Supplier's Level in its Hierarchy

Within a set of duplicates that belong to the same hierarchy, you have the ability to redefine supplier level.

The levels that you can assign depend on the selected supplier because the assignment you make must abide by the rules that control the way supplier hierarchies are organized. You should keep 2 rules in mind:

- The level you assign to a given supplier must be the level that ranks immediately above the supplier's current level: A Site level supplier can be assigned the "Head Office" level, but not the "Group" level.
- The **Set Group** button will only be available if the duplicate set includes a Group level supplier. Likewise, the **Set Head Office** button will only be available if the duplicate set includes a Head Office level supplier.



1. Select the checkbox of the supplier you want to modify.
2. Click the button **Set Group** or **Set Head Office** depending on the case.

ASSESSING SUPPLIERS AND IMPROVING THE RELATIONSHIP

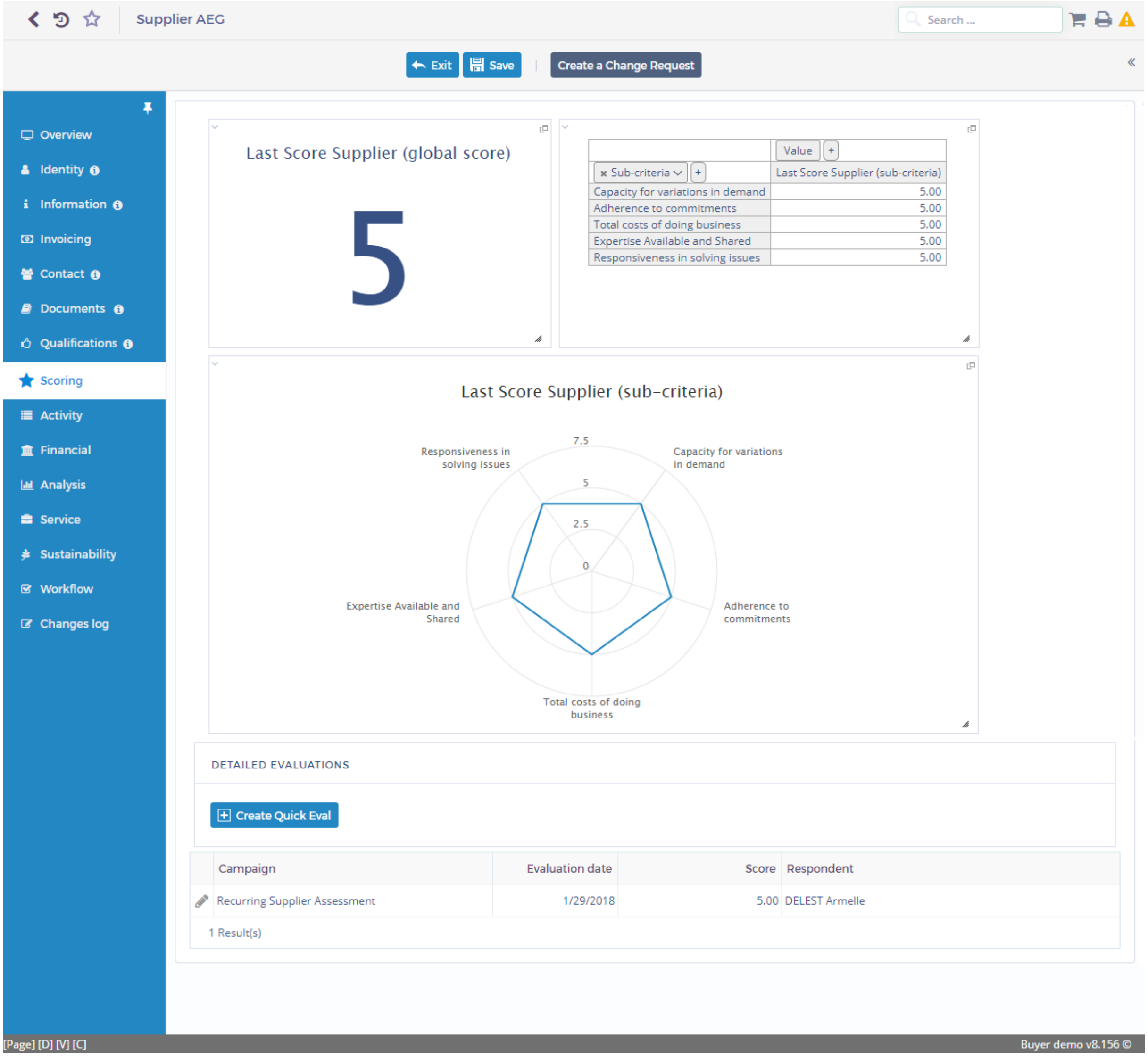
Evaluations

Spot Evaluations

Unlike Scoring Campaigns, where questionnaires are assigned to selected respondents, Spot Evaluations are created at the discretion of the connected user to give feedback on their interaction with that supplier. This means that ANY user who has access to the supplier record can create and fill out a spot evaluation.

Answering the Evaluation Questionnaire

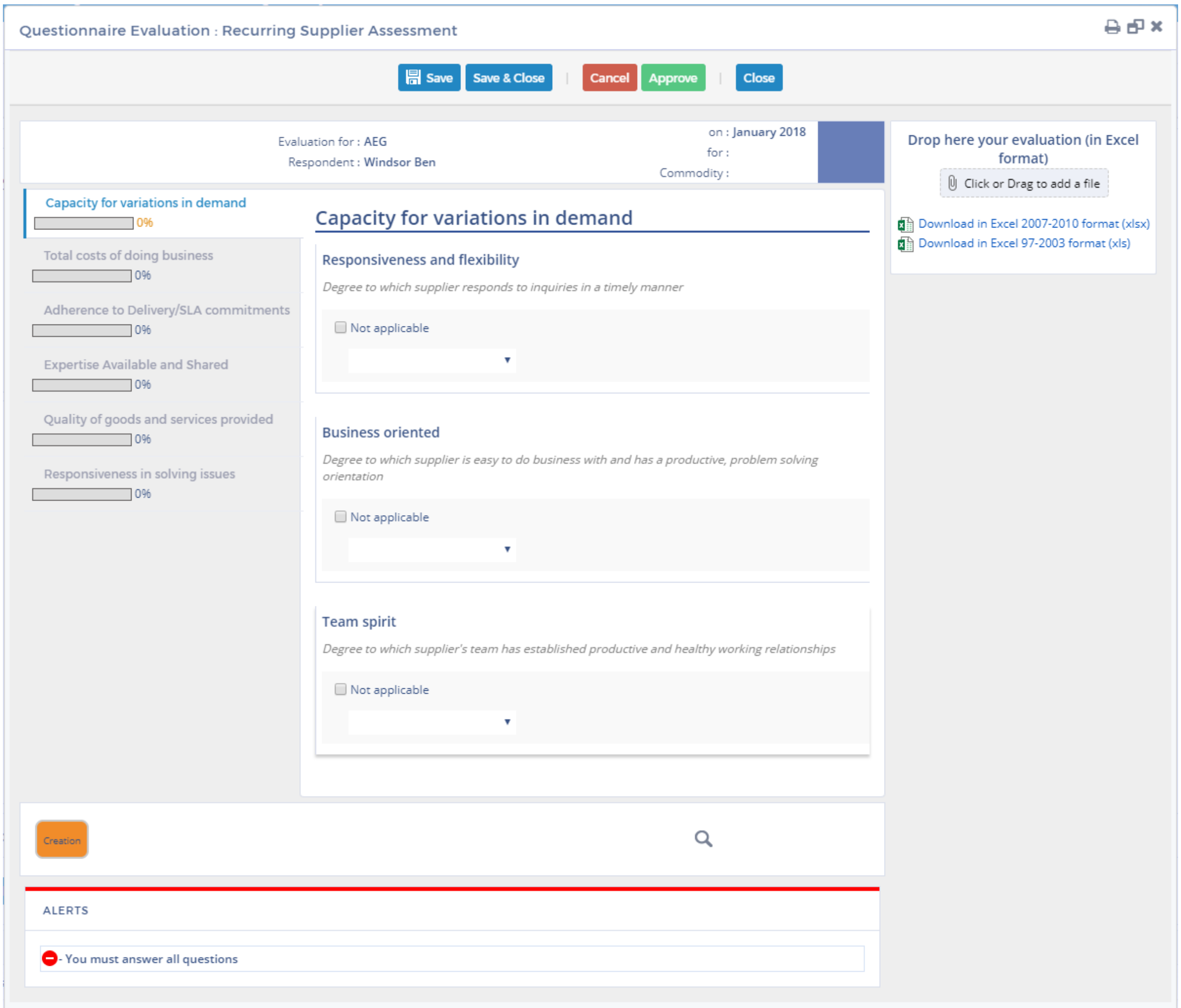
1. In the Supplier Record, display the *Scoring* tab.



2. Click Create Quick Eval.

   If there are more than one questionnaire templates for the *Supplier Scoring* type, a list of available templates will display as a contextual menu: select the desired template.

The questionnaire form is displayed.



3. Fill in the questionnaire.

   Note the following:

   The questionnaire can be broken down into tabs. You must display each tab and answer all questions. A blocking alert is displayed at the bottom of the form until you have done so.

   With each answer, the progress bar and percentage of the corresponding tab are updated to reflect the level of completeness of the questionnaire. The score is computed anew.

   You can answer the entire questionnaire at once or save the questionnaire and come back later.

   Some questions may allow or even require you to provide a comment or a file attachment.

   Some questions may allow you to select *Not applicable* to indicate that the question does not apply to your context.

4. Click **Save**.

Submitting a Completed Evaluation

Once you have completed the questionnaire, you must submit it so that your evaluation can be taken into account and reflected in the supplier *Scoring* tab.

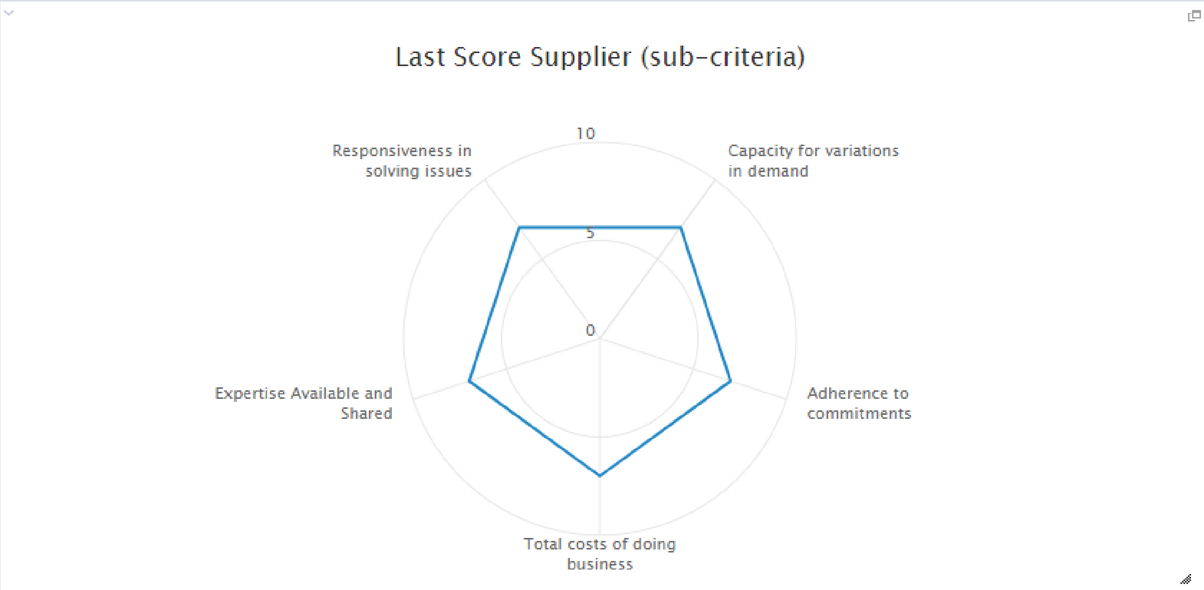
To do so, click **Approve**, and then click **OK** in the confirmation message box that is displayed.

Once submitted, your questionnaire becomes read-only.

Click the **Close** button to close the questionnaire and go back to the supplier *Scoring* tab.

This tab now shows your evaluation results: last supplier score, score breakdown into sub-criteria (table and radar chart).

Sub-criteria	Last Score Supplier (sub-criteria)
Capacity for variations in demand	7.00
Adherence to commitments	7.00
Total costs of doing business	7.00
Expertise Available and Shared	7.00
Responsiveness in solving issues	7.00



About Scoring Campaigns

The IVALUA Suite also includes a separate module dedicated to managing scoring campaigns. Unlike Spot Evaluations, campaigns offer the ability to assess a whole set of objects (suppliers, contracts, and so on) and manage all these evaluations within a single process.

The Scoring Campaigns module facilitates the collection of evaluation data, its consolidation and analysis.

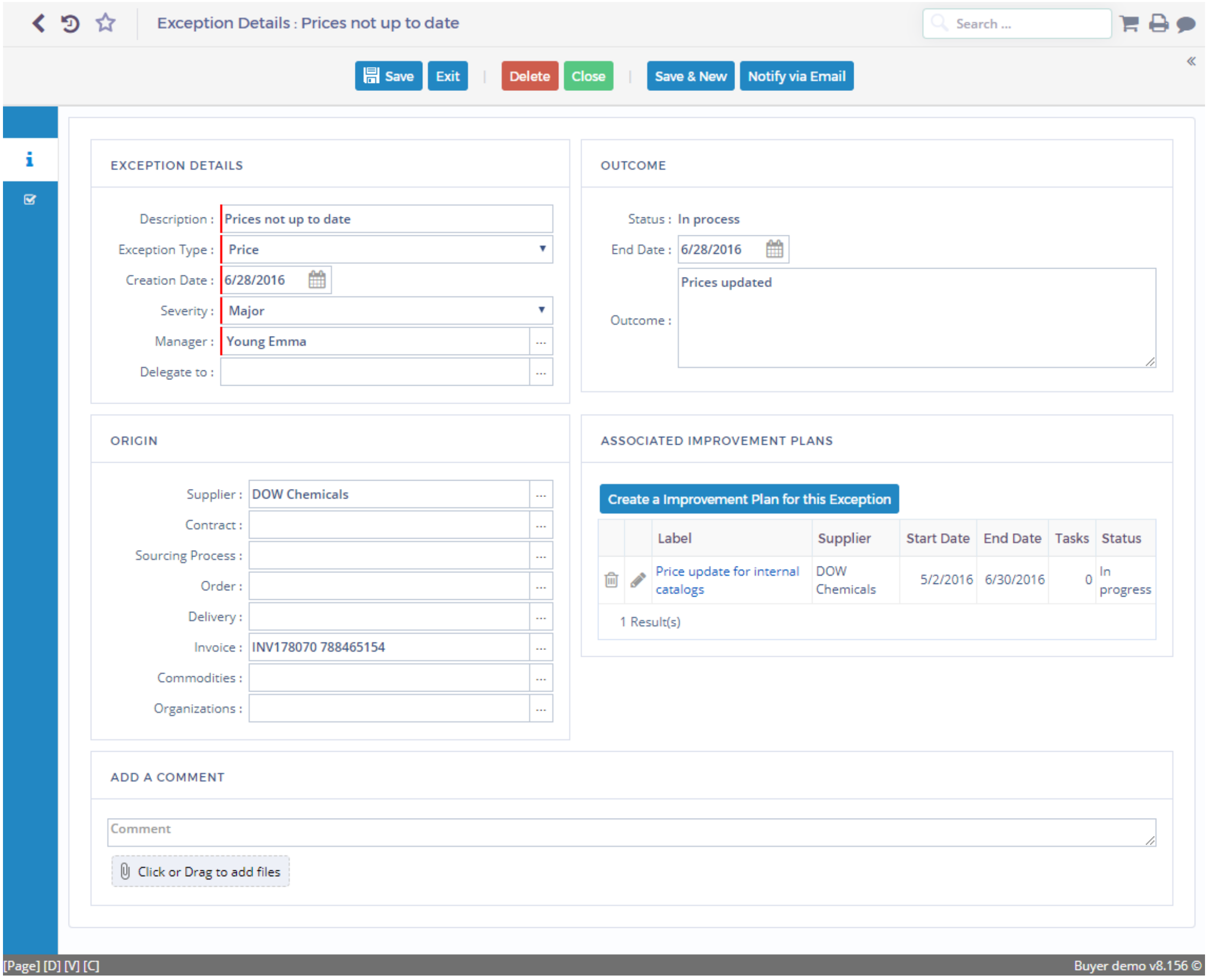
For further information about this module, refer to the dedicated user guide.

Exception Management and Improvement Plans

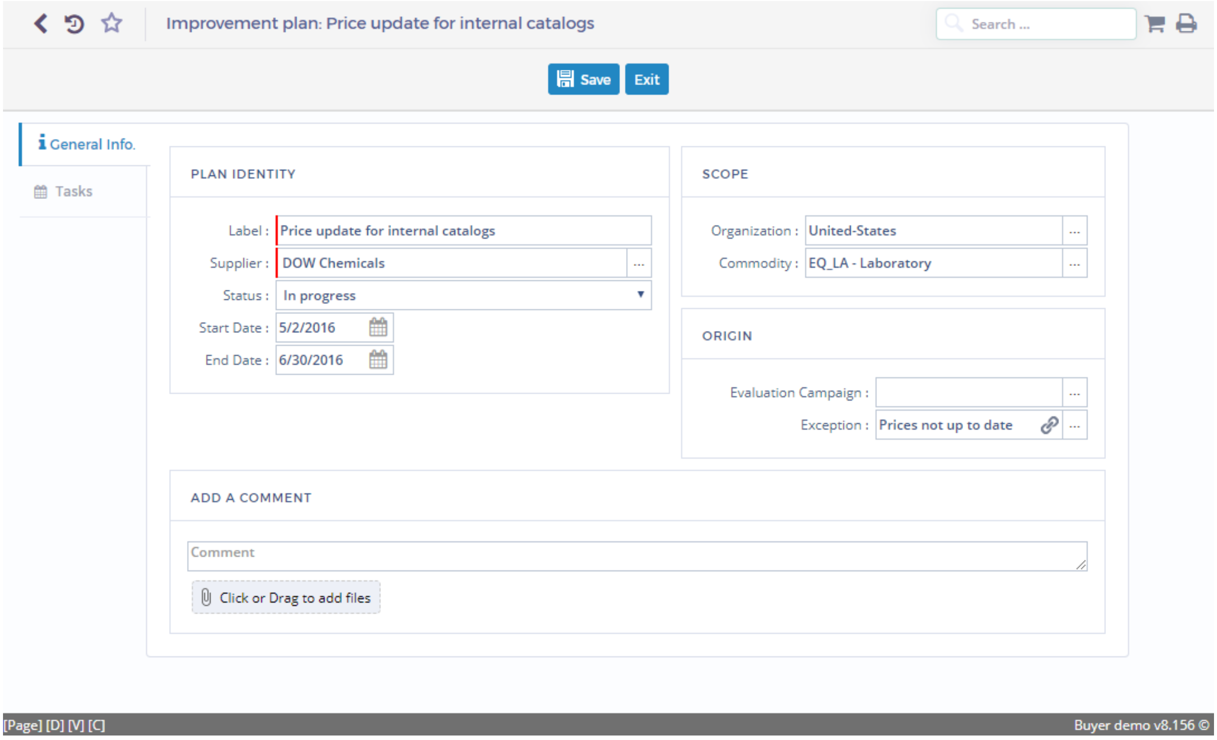
The IVALUA Suite complements its supplier performance evaluation features with additional modules geared toward continuous improvement:

- Exception Management
- Improvement Plans

The **Exception Management** module gives you the ability to report problems arising within the relationship with the supplier and track the issue to resolution.



The **Improvement Plans** module helps you build and follow up a plan of corrective actions or Kaizen type initiative with the supplier to address the problems that have been identified.



For further information about these modules, refer to the dedicated user guides.

REFERENCE GUIDE

Browse Suppliers Page

The *Browse Suppliers* page provides a complete picture of the supplier database.

Accessing the Browse Suppliers Page

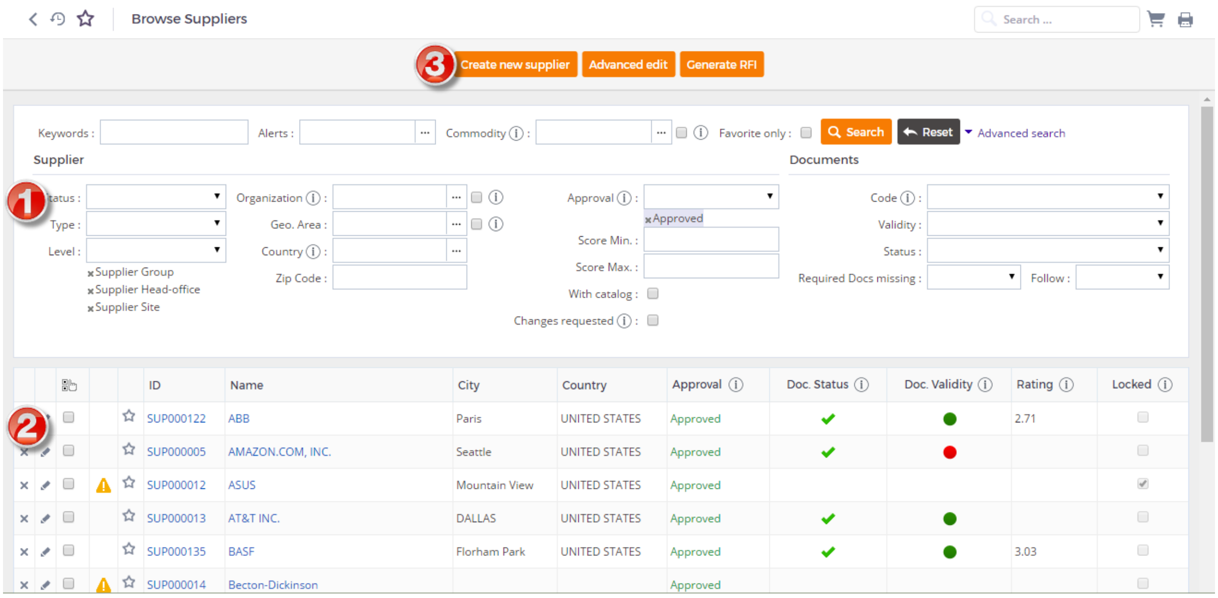
Select *Suppliers / Browse Suppliers* from the menu.

Getting Familiar With the Browse Suppliers Page

The *Suppliers* page allows you to browse and manage the Supplier Base.

It contains 3 main parts:

1. Search filters
2. List of results
3. Action bar



Search Filters

This area includes various filters that you may combine in order to fine tune your search, and thus retrieve a specific supplier or a set of suppliers meeting precise criteria.

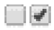
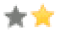
The option *Supplier with catalog* aims at restricting the display to suppliers with items referenced in the catalog.

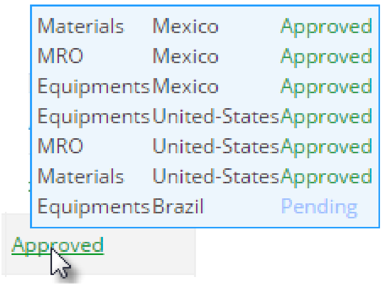
The option *Advanced editing* allows you to merge 2 supplier records, duplicate records for instance (see *Simple Merge of Two Supplier Records With Transfer of Operational Objects*, page 68).

List of Results

It displays suppliers that match the criteria selected in the search filters area.

The table below gives a description of the data presented for each supplier:

Column	**Description**
(Right click on the list header row)	Gives access to the following features: ▪ *Show/Hide columns:* lets you select the columns you wish to display or hide in the list ▪ *Download in Excel format:* lets you download the list into Microsoft Excel® format
	Deletes the Supplier record (deletion becomes effective only after confirmation)
	Opens the Supplier record.
	Allows you to select suppliers you wish to send an RFI to
	Indicates the presence of anomalies on the Supplier record Hover the icon with your mouse cursor to display alerts in a tooltip.
	Allows you to mark/unmark a supplier as favorite (the icon will change appearance depending on its status: non-favorite =  / favorite =) You then have the ability to filter favorite supplier using the checkbox *Only favorite suppliers* in the supplier list's filters area.
ID	Supplier code automatically assigned by IVALUA (read-only)
Name	Supplier's corporate name – Click to open up the Supplier record in View mode (read-only).
Parent company	Name of the parent company the current supplier is related to.
Level	Operational level of the supplier (if the supplier belongs to a group that includes several entities, the supplier level indicates their position within the operational structure): ▪ Group ▪ Head-Office ▪ Site ▪ ERP (specifically for managing supplier data originating from external ERPs as part of the spend analysis function)
City	Supplier's city
Country	Supplier's country
Web site	URL of supplier's web site
Status	Supplier status within the suppliers' activation workflow Drafted The Supplier Record is in the process of being created but its activation workflow has not been launched yet Activation in progress The activation workflow has been launched Activated The supplier has been activated and can now be used in the various IVALUA modules Archived (not used in the out-of-the-box version) Can be used to differentiate, on one hand, suppliers which you want to delete because they have been created in error, and, on the other hand, suppliers that were once active, but which you no longer want to work with. Archived suppliers continue to be accounted for in analysis reports but can no longer be used in the application.

Column	Description
Approval	Approval status of supplier The status displayed here is the highest of the supplier's commodity approvals that match the selected Organization and Commodity filters. For instance, if a supplier has an Approved status on one of their commodities and a Forbidden status on another, the displayed status in this column will be Approved. Hover your mouse over the status to display the list of approvals in a tooltip: 
Doc. Status	Overall conformity status of credentials If at least one document is non-compliant in the supplier record, the supplier will be listed with a non-compliant overall status in the list of suppliers. ✔ All documents have a *Compliant* status ✖ At least one document has one of the following statuses: *Being created*, *To be checked* or *Non-compliant*
Doc. Validity	Overall validity status of credentials as calculated against their validity dates Valid: all documents are valid in relation to their validity dates Impending expiry: at least one document has reached the alert delay set for its type Invalid: at least one document is not valid in relation to its validity dates (begin date in the future, end date exceeded)
Rating	Overall performance rating score obtained by the supplier (*Performance rating* tab)
Change request status + Locked	These 2 columns are displayed when Supplier Change Requests are enabled (see p.36 for more information about this feature).

Action Bar

Button	Description
Create new supplier	Creates a new Supplier record (see *Supplier record,* p.85)
Generate RFI	Creates a new supplier RFI (you must first select one or more suppliers using their checkbox)
Advanced Edit	Gives access to the supplier record Merge feature (see p.68)

Searching for Suppliers

The upper part of the *Suppliers* window contains search filters. These filters let you easily retrieve a supplier or a set of suppliers meeting specific criteria.

1. Define your search criteria by selecting appropriate filters.
2. When done, click the **Search** button to start searching. Matching items are displayed in the results list.

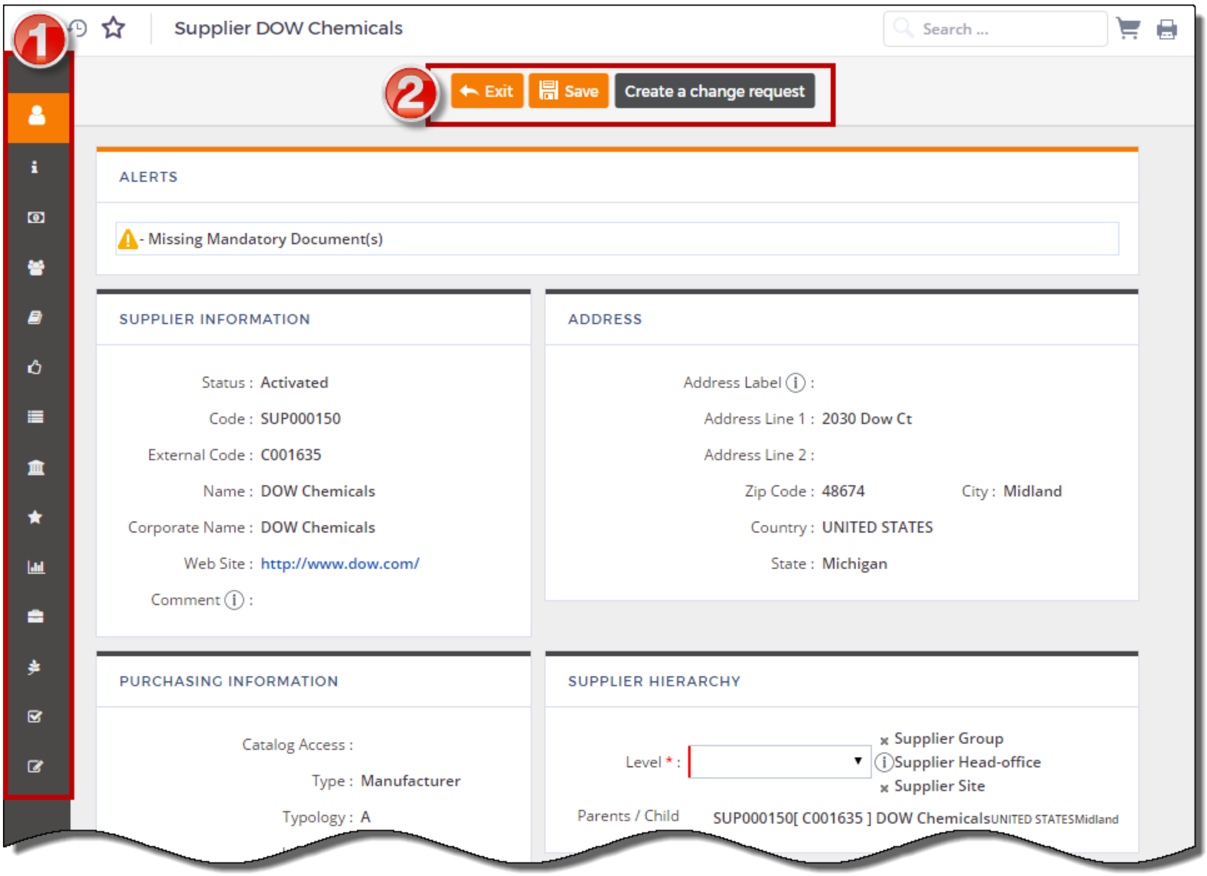
   To cancel selected filters and go back to the default list, click the **Reset** button.

Supplier record

Overview

A Supplier record contains all the information currently available about the supplier. It consists of two parts:

1. Supplier Data Tabs
2. Action Bar



Tabs

The tabs allow structuring the supplier information.

To obtain a description of each tab, refer to the following sections:

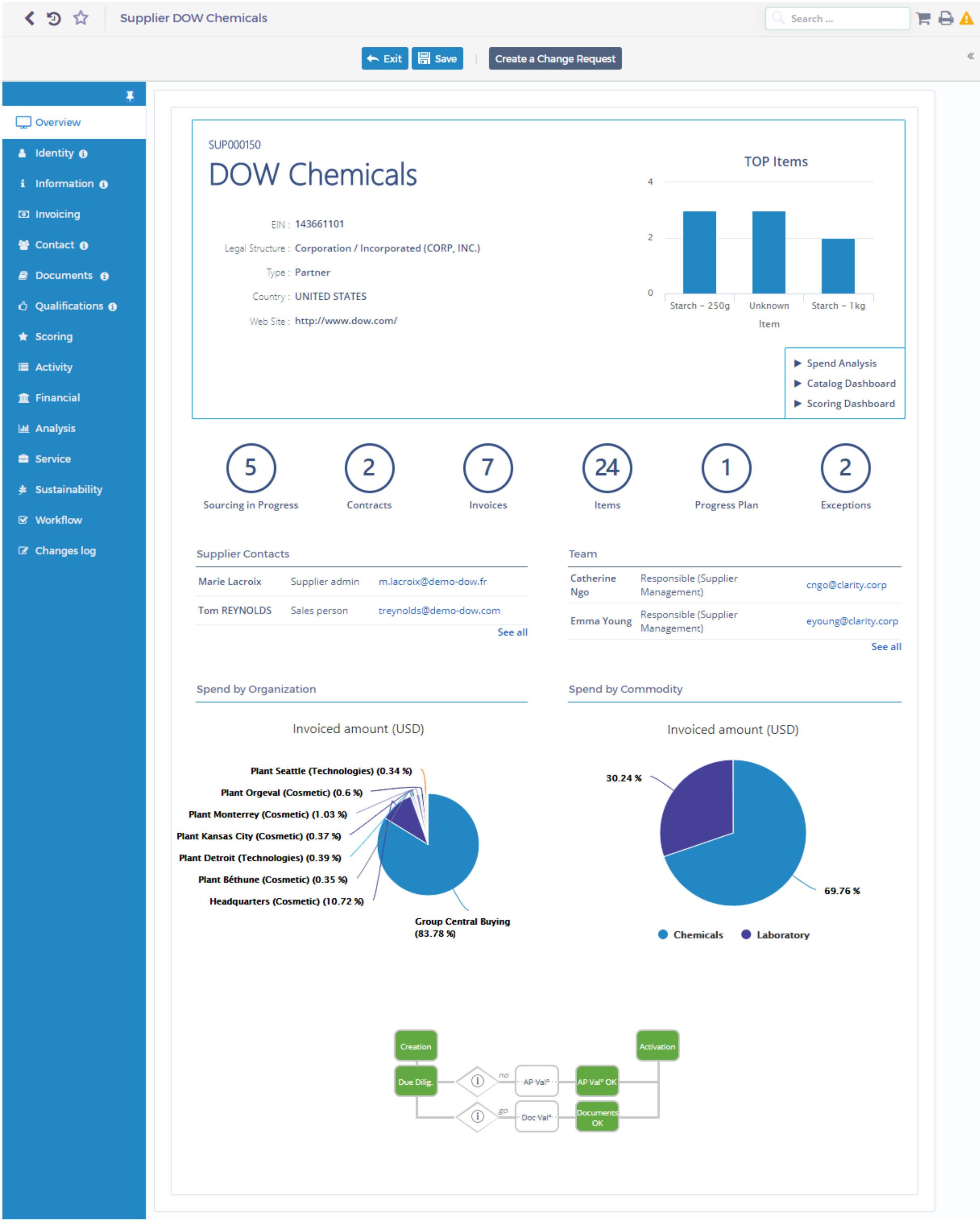
Tab name	***Page***
Overview	87
Identity	87
Information	90
Invoicing	91
Contacts	93
Documents	94
Qualifications	97
Scoring	98
Activity	98
Financial	101

Upon creation, a Supplier record contains only two tabs (*Identity* and *Information*); other tabs are displayed after the first Save.

Action Bar

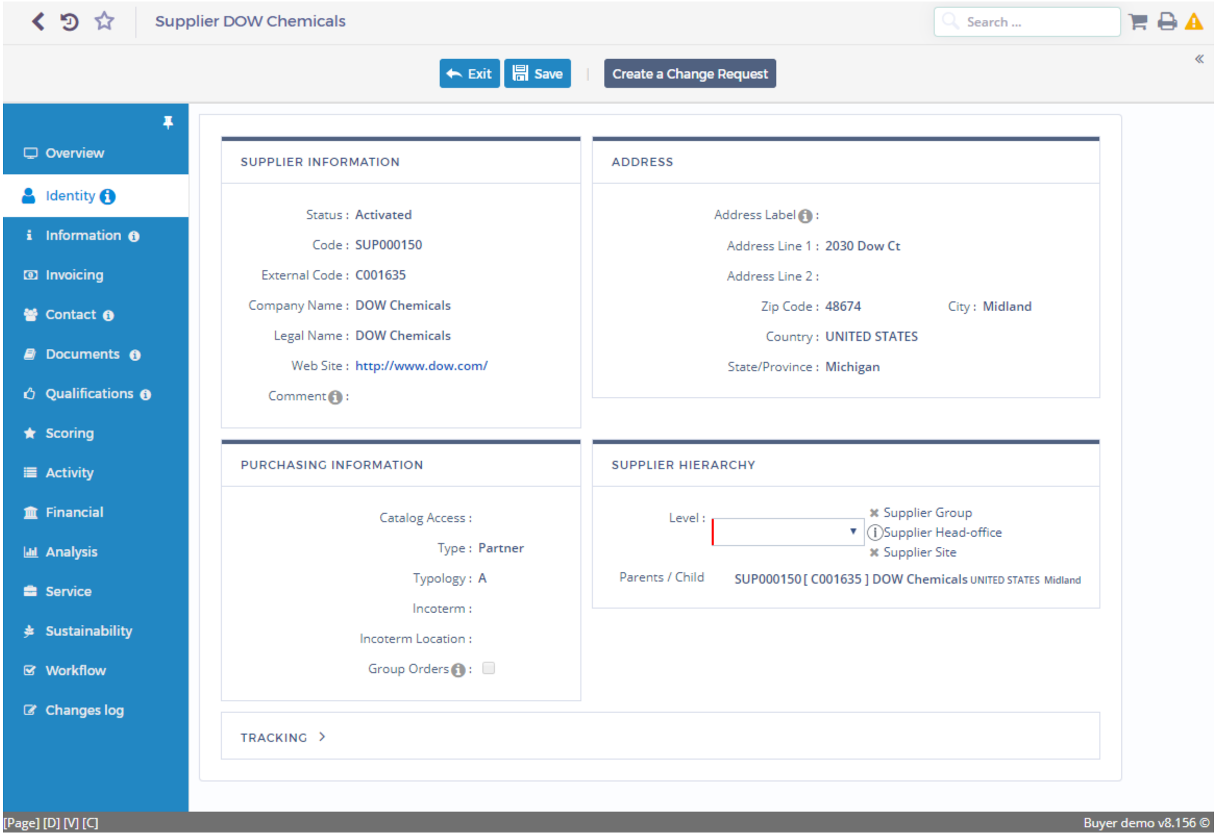
Button	*Description*
Save	Saves data entered in any tab and keeps the Supplier record open
Exit	Saves your edits and closes the page.
Create a change request	This button is available only when change requests are enabled (change requests are a way of exerting tight control over changes brought to the Supplier Record). For further details, see p.36)

Overview Tab



This tab provides a high-level, at-a-glance view of supplier activity, main analytics, and contact people on the buy- as well as supply-side. There is also a miniature view of the supplier activation workflow.

Identity Tab



This is the supplier’s identity sheet, it contains the following information:

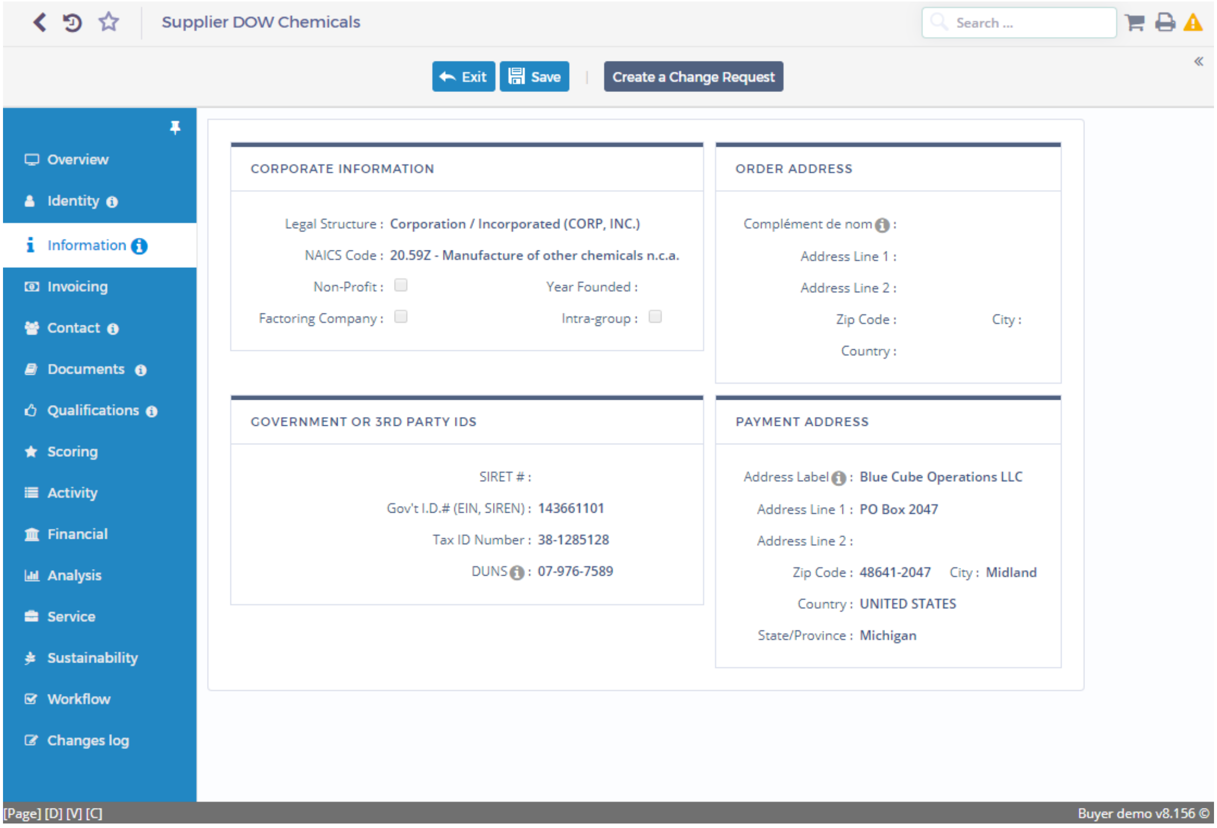
Field	***Description***
Status	Supplier Record status, which indicates the validity of the supplier’s registration within IVALUA (Drafted, Activation in progress, Activated)
Code	Internal ID automatically assigned by IVALUA (read-only)
External Code	Supplier ID from the ERP system (editable only by authorized users)
Company Name	Name under which the company is doing business
Legal Name	Name under which the company is officially registered
Web Site	URL of the supplier’s website
Comment	Can be seen by the supplier
Address	Full address of company headquarters
Catalog Access	URL of supplier catalog
Supplier type	Distributor, Manufacturer, Supplier, Partner, and so on
Supplier typology	Typology, indicates the supplier’s strategic importance. The typology used in the out-of-the-box version is ABC, but this is configurable.
Incoterm / Incoterm Location	In purchase orders to be placed with this supplier, incoterm info will be defaulted with your selection in this tab.
Group orders	Used in P2P processes; when enabled, all PR items related with this supplier will be on hold until manually grouped together to generate a PO. For further details, refer to the Procurement user guide.

Levels	To define the operational structure of the suppliers registered on its supplier portal, IVALUA uses a set of levels: ▪ Group ▪ Head Office ▪ Site ▪ ERP (this last level being reserved for handling suppliers imported from ERPs) The specific set of tabs available in the supplier record can be adapted to the position of the supplier in its hierarchy. Likewise, application objects such as RFPs, contracts, or orders, are each linked to a specific level. With this in mind, each supplier can be assigned one or more levels. Smaller suppliers, for instance, could hold multiple levels concurrently, while more complex groups can be organized into hierarchies.
Parent/Child	Supplier operational hierarchy represented as a tree structure - each supplier name in the tree structure is a clickable link, which allows you to access the corresponding supplier record.

See also:

Assigning Supplier Levels, page 17
Defining Hierarchical Links Between Suppliers, page 18

Information Tab

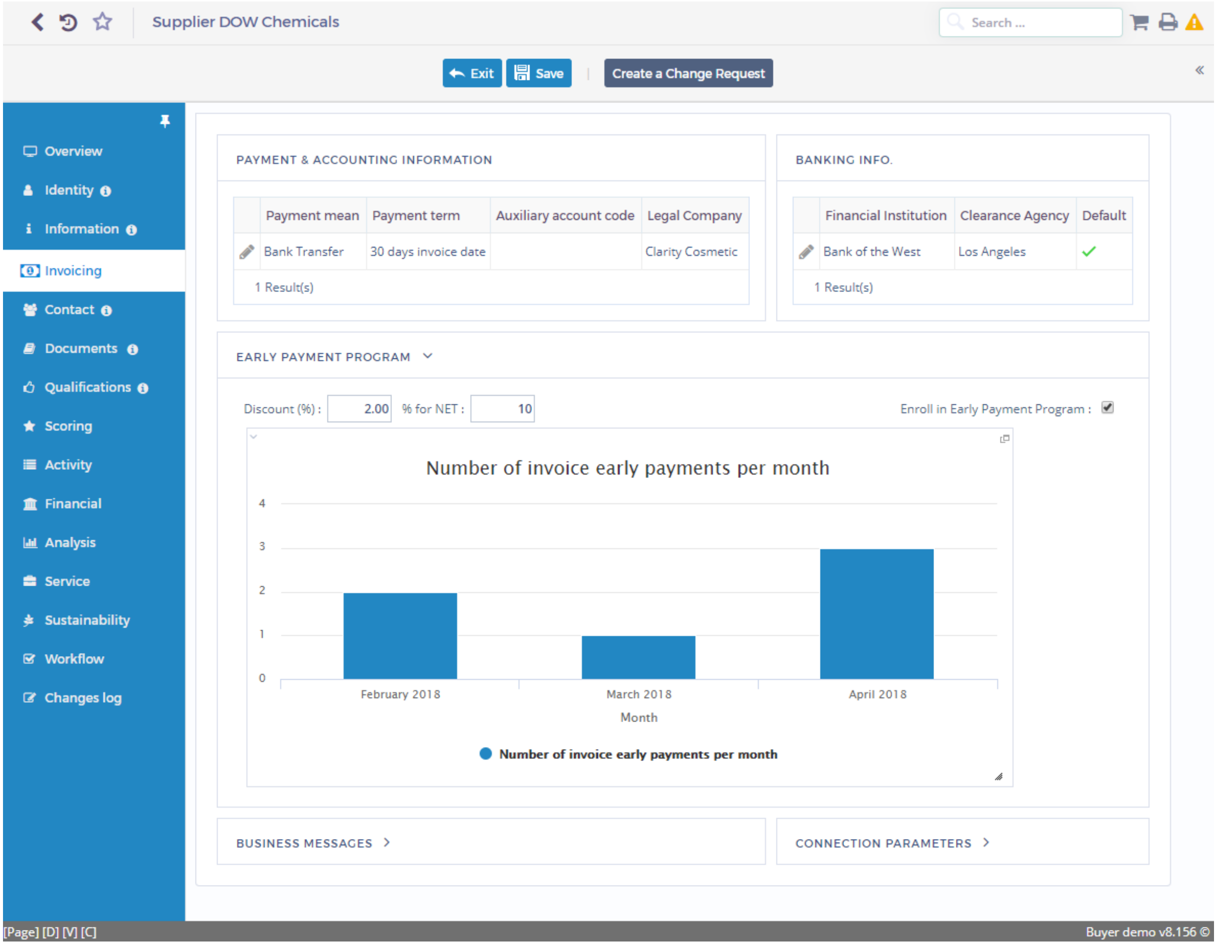


This tab lets you enter/view the supplier's administrative data:

- Corporate settings: Legal Structure, NAICS code, Year Founded, Non-Profit, Intragroup, and Factoring Company (suppliers declared as factoring companies can be selected in the payment and accounting information of the *Invoicing* tab of suppliers who choose to factor).
- Government or 3rd Party IDs: DUNS, Tax ID Number, Government ID Number (EIN, SIREN), SIRET (France only)
- Order and payment addresses: Used in P2P processes

Some of the *Information* tab fields can be auto-populated by partner content providers (requires a subscription).

Invoicing Tab



This tab lets you specify the following types of information:

Payment and accounting information

These are sets of information that can be defined per legal company and are used to default payment and accounting information in the P2P process. They include: payment type and terms, tax mode (self-assessment), third party accounts for current and fixed assets, and auxiliary account (for further explanation of each of these fields, see p.30).

Field	***Description***
Legal Company	You can declare a different set of Payment and Accounting Information per legal company. **Important note**: Specifying the legal company is optional. Payment terms that are not associated to a specific company will become the default payment terms and will be used for P2P transactions involving legal companies whose payment terms are not specified.
Payment means and terms	When placing an order, the payment means and terms are automatically prepopulated based on the contract linked to the order, or in the absence, they will be populated based on the data selected in this screen. In other words, if you set up payment terms here, but notice that the payment terms that are prepopulated in orders placed with this supplier do not match those you've set up, this probably means that the items ordered are linked to a contract that provides otherwise.
Tax mode	The main purpose of tax mode is to specify whether tax should be self-assessed with this supplier. This influences the way accounting entries are generated in invoices.
Factor	If the supplier uses Accounts Receivable Financing (or Factoring), this field lets you select the factoring company from the Supplier Base. To be able to select a factoring company here, that company's supplier record must have been created beforehand and the company must have been declared as a factoring company in its *Information* tab.

Field	*Description*
Third party accounts for current and fixed assets	These are the Accounts Payable accounts where all the liabilities to suppliers (that is the amount of all recorded invoices that have not yet been paid for), should be recorded. There are two such accounts, one for liabilities incurred to buy assets and one for expenses: it's the nature of the purchase (asset or expense) that determines which AP account will be used. These accounts can be specified at the legal company level, in which case they apply to all suppliers by default. They can also be specified here (at the supplier level), in which case they override the default accounts set for the legal company. In the invoice, accountants ultimately retain the ability to specify any AP account they deem appropriate.
Auxiliary account code	If you need to track transactions within AP accounts in more detail using a subsidiary ledger, this is where you can specify the subledger to be used for the current supplier.

Early Payment Program

With the Early Payment Program, you can offer selected suppliers the flexibility to expedite receipt of payment in exchange for a discount. Suppliers enrolled in this program then decide which individual invoices they approve for early payment.

Calculation of applicable discount is based on two parameters:

- Percentage of discount
- Number of days

Those parameters are used to evaluate the percentage of discount based on a linear calculation.

'2% NET 10', for instance, means that up to 10 days after the invoice date, a 2% discount is granted, which linearly decreases to zero after that, until the due date. So, the earlier the payment, the greater the discount.

Banking information

This area provides a space to declare the supplier's bank accounts to be used in the P2P process. You can set up several accounts for a supplier: the *Default* box designates which one is the primary account.

The Bank Identifier Code (sometimes called SWIFT) is an international standard used to identify a specific bank.

For account identification, various systems of codes are included; while some are international standards (IBAN), others are national systems (ABA and RIB). National systems of codes can be configured to be hidden when not applicable.

Notes:

- When keying in the IBAN, you must remove the spaces in the BBAN field.
- ABA is specific to the USA.
- RIB is specific to France. The RIB is automatically populated based on the IBAN when the IBAN country code is FR. The reverse is also true: if you enter the RIB, the IBAN will be auto populated.

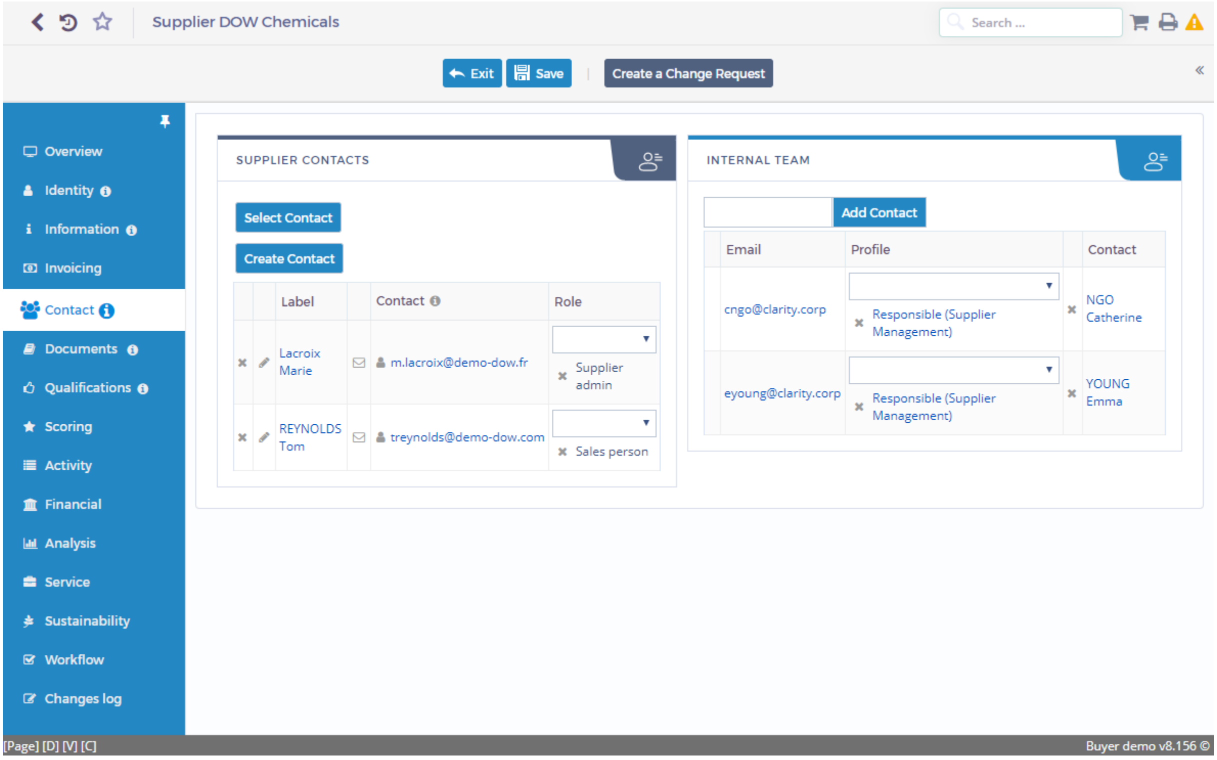
Business Messages / Connection Parameters

These areas are dedicated to the configuration of interfaces shared with the P2P module for electronic delivery of POs and invoices. Supported exchange formats are EDI and cXML.

See also:

Declaring Supplier Banking Information, page 29
Declaring Supplier Payment and Accounting Information, page 30

Contacts Tab



This tab lets you manage contacts in relation to the supplier. There are 2 distinct categories of contacts: supplier contacts and internal users.

Supplier contacts

These are the supplier contact persons.

New supplier contacts can be created either by existing supplier contacts via the Purchasing Portal, or by buyers (see page 19). Both supplier users and buyers can generate IVALUA login credentials for contacts that need to access the application via the Purchasing Portal (see page 21).

A contact can be attached to multiple suppliers within the same hierarchy (multi-supplier contact, see page 22).

Internal users

The *Internal users* frame allows you to list internal users in charge of the supplier, particularly users who will be granted permission to update the record data. There are 3 internal user profiles:

- Owner: (required, assigned to the record creator by default; in the case of a self-registration, the internal user who validates the registration is considered the creator) Users with an Owner profile are in charge of the supplier they own. Their role is to input and control the supplier record information, and manage the internal buy-side team assigned to the supplier (add or remove users).
- Contributor: A user with the Contributor profile can fill in the information of the record.
- Guest: (default) Users with a Guest profile can view the supplier record. They cannot modify it.

See also:

Creating a New Supplier Contact, page 19
Creating a User Account for an Existing Supplier Contact, page 21
Managing Multi-Supplier Contacts, page 22

Documents Tab

Overview

This tab provides a space where supplier contacts and internal users can upload required legal documents, certifications, and other documents. Once supplied, documents can be downloaded from this screen. They are listed by category, with each category grouping one or more document types.

Document categories and types are managed by the Administrator. Through document types' configuration, the Administrator can specify which document types are **available** and which are **mandatory**; these characteristics can vary based on country, commodity, organization, and/or other custom criteria. Other document type settings include **validity duration**, **advance notification days (**number of days in advance of the expiry date that suppliers will be notified they need to update a document), and whether the document **conformity status is workflow-driven or selected manually**; for a given document type, a different workflow can be implemented per country, commodity, and/or organization.

The option *Follow documents* is used to identify suppliers whose documents you want to follow. A filter lets you easily retrieve these suppliers in the supplier browse screen. As part of a subscription with a partner, enabling this option will include the supplier in the list of suppliers followed by the partner.

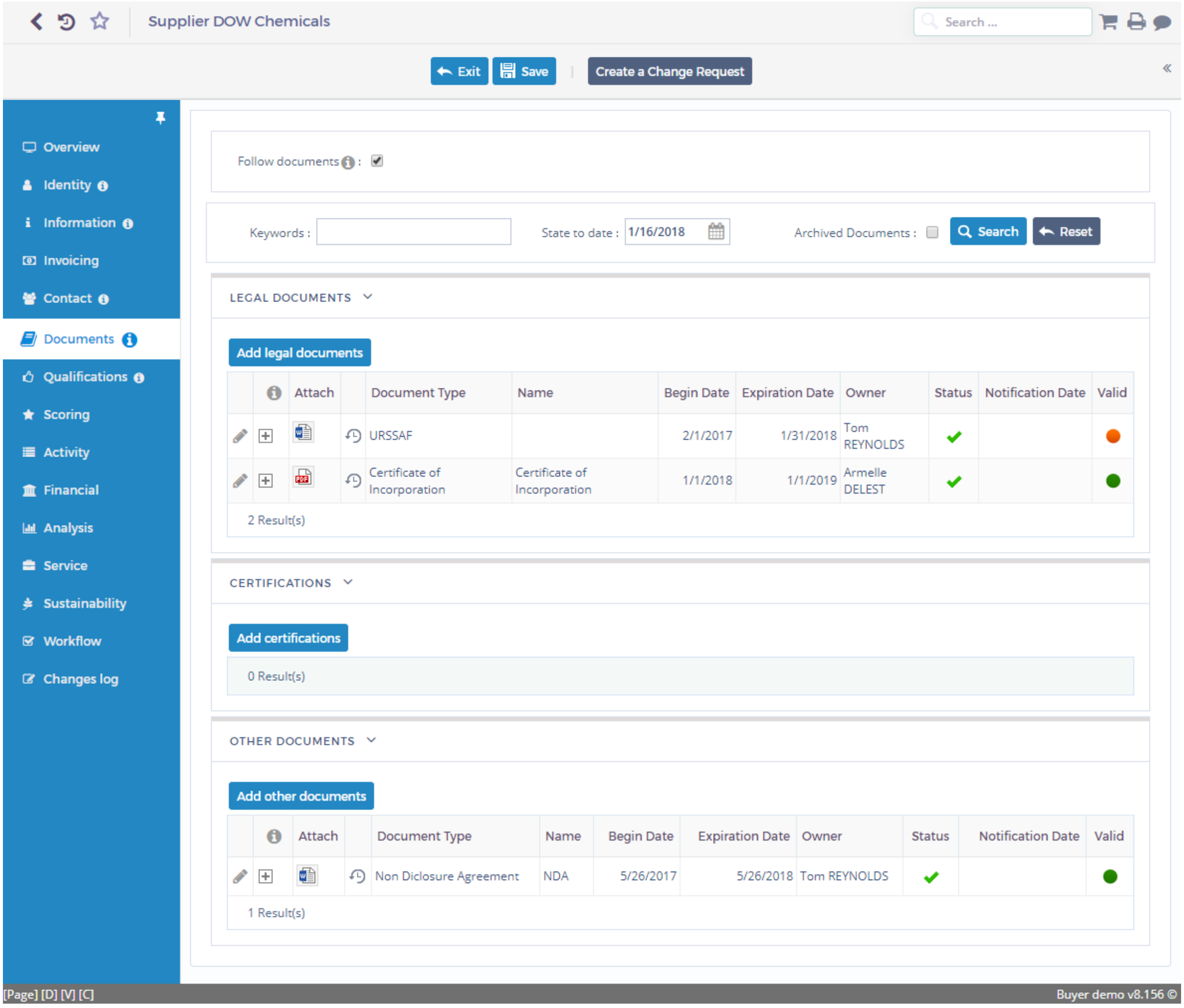
Access Rights

Documents can be viewed by profiles that have been granted the View authorization associated with the document type or users who act as performers in the document approval workflow.

Documents can be edited by profiles that have been granted the Edit authorization associated with the document type or users who act as performers in the document approval workflow with an Edit authorization on the workflow activity.

Documents can be created by users who have been granted the View and Edit authorizations for the document type

User Interface



Each document category table presents the following information:

Column	***Description***
(Right-click on the header row)	Accesses the following features: ▪ *Show/Hide columns:* allows you to select the columns you want to show or hide in the list ▪ *Download in Excel format:* Allows you to download the list in MS Excel format
	Accesses document settings (file selection and upload, validity dates and compliance approval)
	Adds a document
Att	Attachments. Click an attachment icon to download it.
	Accesses the history of documents uploaded by the supplier for the selected type
Document type	Document type Required document types are marked with a red asterisk. The Administrator defines which document types should appear and which ones should be mandatory per country, commodity, organization, and/or other customizable criteria.
Title	Document title

<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Begin validity date
End validity date</td><td>Validity dates of the document</td></tr>
<tr><td>Owner</td><td>By default, the user who adds the document</td></tr>
<tr><td>Status</td><td>Document compliance status

An approval workflow can be associated with each document type so that the buyer can approve the documents uploaded by the supplier in the portal. The document compliance status is displayed in the form of a visual indicator red cross or green check mark) and is further specified in a tooltip:

Compliant

Being created, To be checked or Compliant

When there is at least one non-compliant document, the supplier will be displayed with an overall non-compliant status in the supplier list.</td></tr>
<tr><td>Validity</td><td>Document validity in relation to its Begin and End validity dates

Auto-calculated and read-only

3 possible validity statuses:

Valid

Impending expiry: the document has reached the alert delay defined for the document type

Invalid: the document is not in its validity period (end date exceeded or begin not reached)

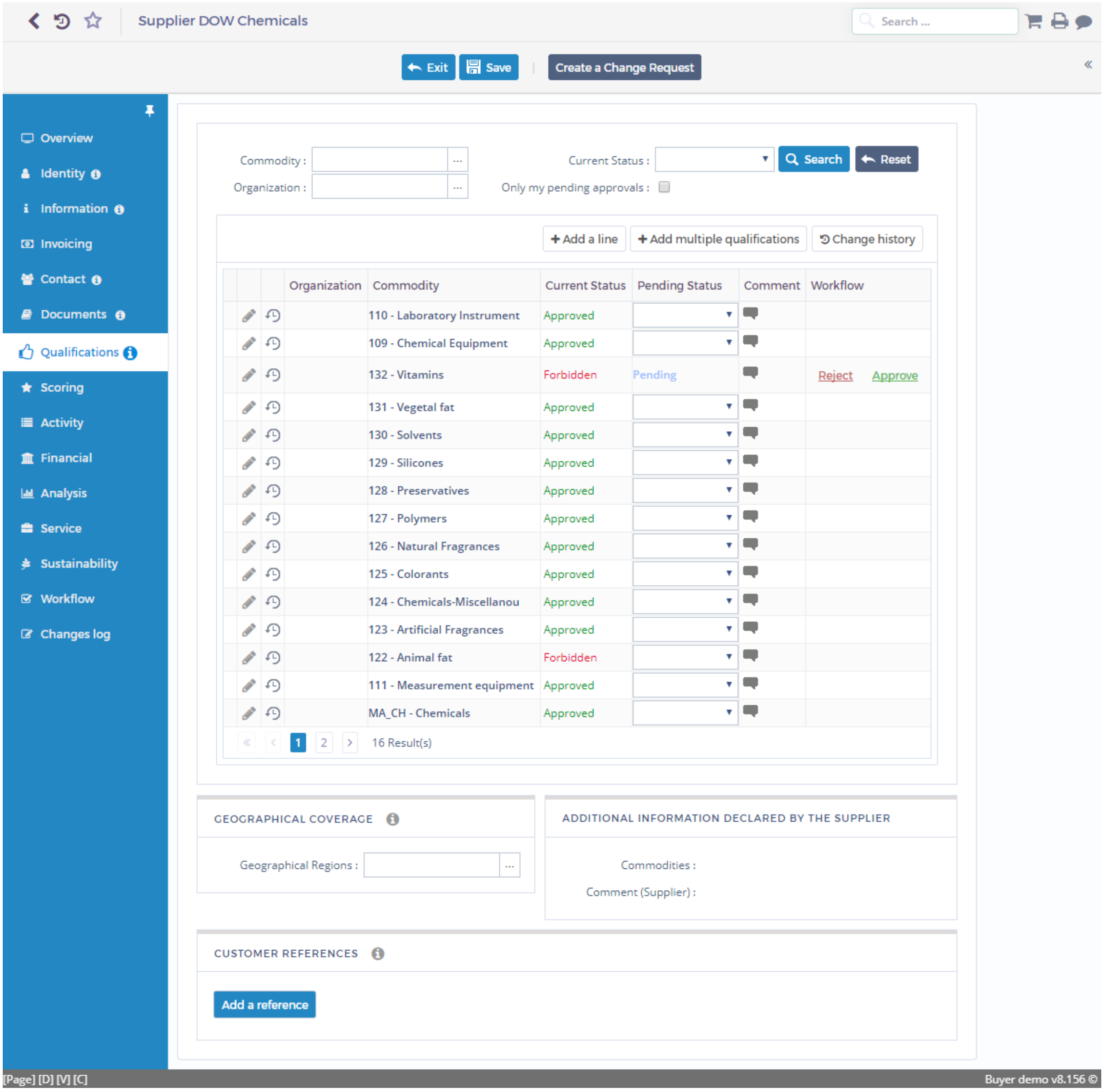
When the end date is exceeded, it will be displayed on a red background.

<table><tr><th>Date de fin de validité</th><th>Propriétaire</th><th>Statut</th><th>Validité</th></tr><tr><td>06/02/2014</td><td>DE A</td><td></td><td></td></tr></table></td></tr>
</table>

See also:

Attaching Documents, page 31
Archiving/Unarchiving Documents, page 33

Qualifications Tab



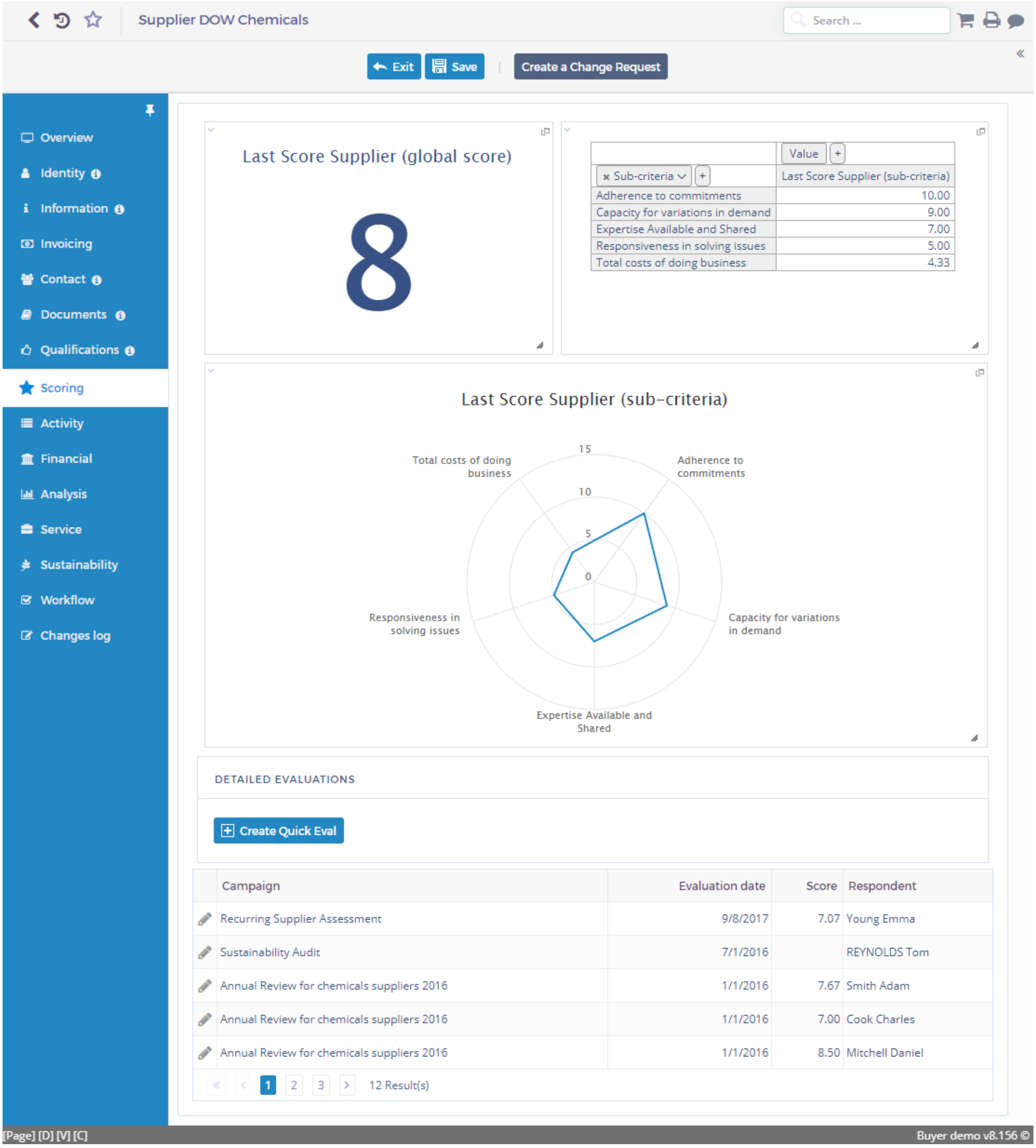
This tab lets you:

- Manage the qualification approval statuses of the supplier by organization and by commodity (status change may be submitted to approval depending on configuration)
- Manage the geographical areas served by the supplier
- Manage customer references, either entered by the supplier during registration or later via the Supplier Portal, or entered here by buyers

See also:

Requesting a Qualification Approval, page 24
Modifying or Deleting an Existing Qualification, page 26
Approving a New Qualification or a Qualification Status Change, page 27

Scoring Tab



This tab shows the last score obtained by the supplier, as well as different visualizations of the score breakdown into sub-criteria (table and radar chart). These scores are displayed real-time.

This tab also lets users carry out spot evaluations of the supplier in order to give feedback on their interaction with that supplier.

The bottom part of the page shows a list of all the spot evaluations conducted relative to the supplier.

About Supplier Score

The Last Supplier Score (in other words, the Current Supplier Score) can originate from any *Supplier Scoring* type questionnaire, whether used in a spot evaluation or in a supplier scoring campaign.

Which score is the last one is determined based on the questionnaire evaluation period, and more specifically, on the evaluation period end date: the questionnaire that has the most recent evaluation period end date is considered as carrying the last score.

If there happens to be more than one questionnaire with the same “most recent” end date, then the questionnaire with the longest evaluation period will prevail, and then the one with the highest GUID.

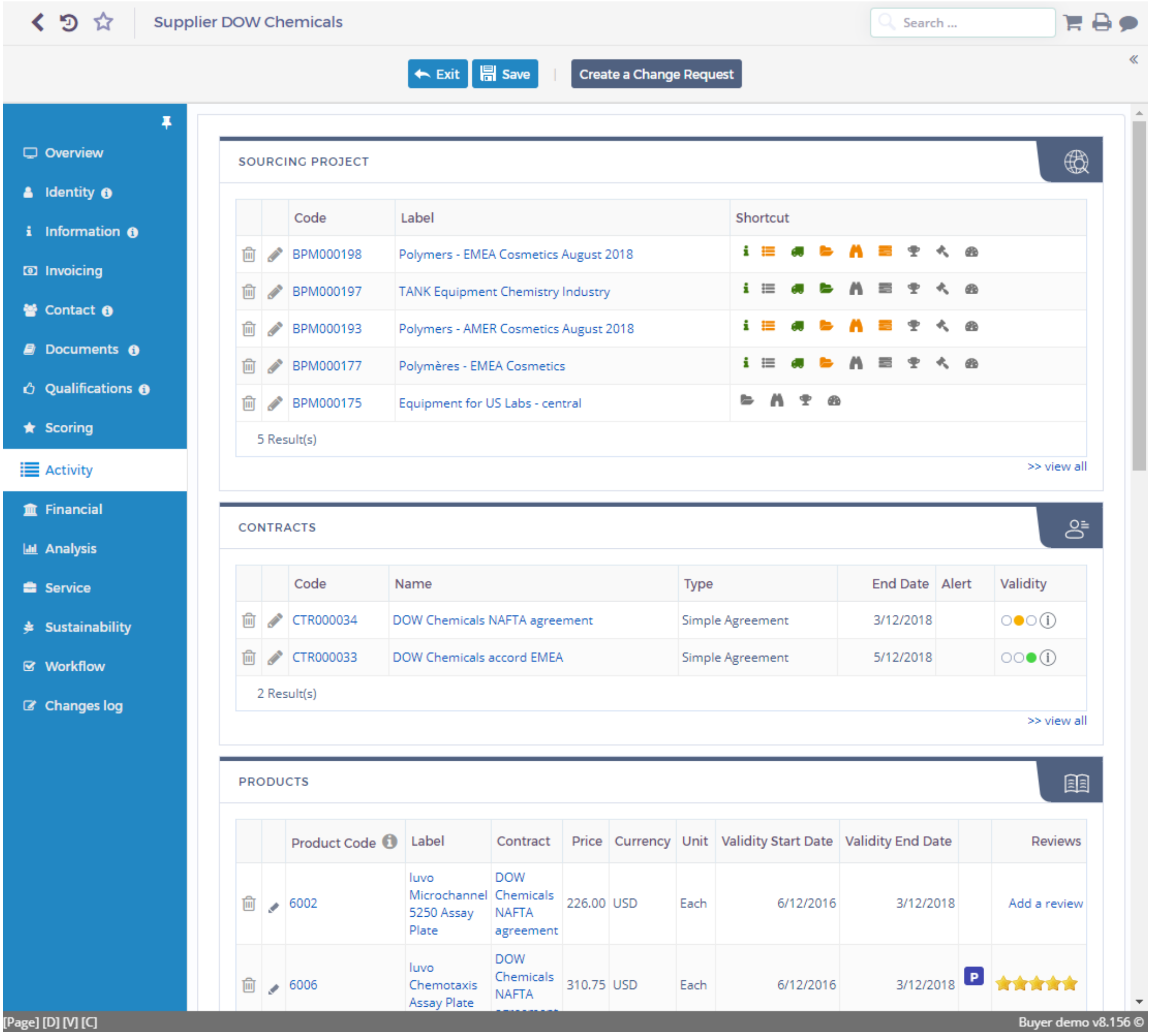
Only validated evaluations attached to a closed questionnaire are taken into account.

When the score originates from a scoring campaign, it is computed as the average of all campaign evaluations relative to the supplier. One evaluation is a weighted average of its section, sub section, and question scores.

See also:

Spot Evaluations, page 76
Answering the Evaluation Questionnaire, page 76
Submitting a Completed Evaluation, page 78

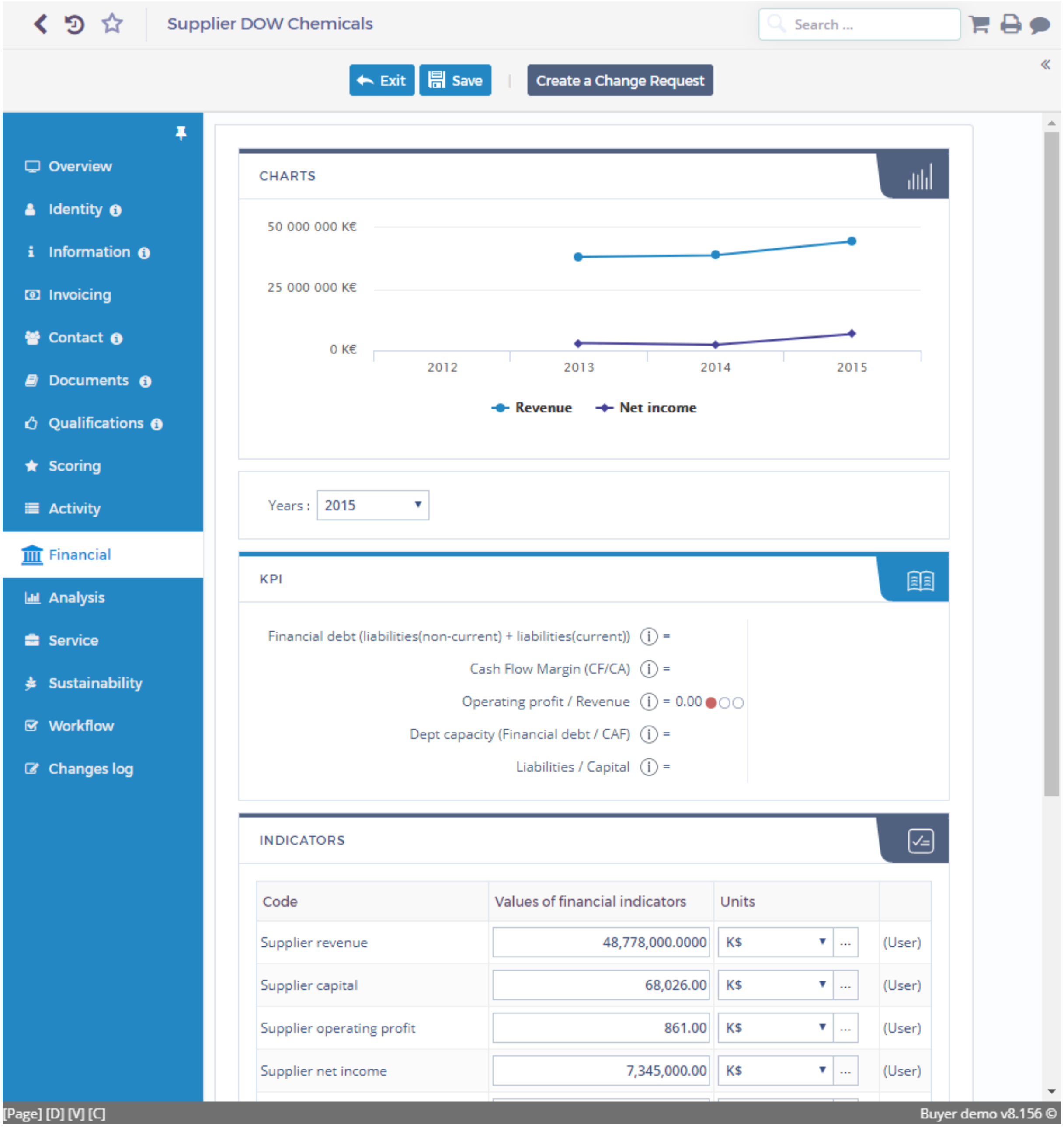
Activity Tab



This tab is auto populated. It presents an overview of the supplier's activity with your company: orders, sourcing processes, items ordered, etc.

It offers quick access to the various listed resources. For each resource type, a *View all* link points to the resource dedicated search page, filtered on the current supplier.

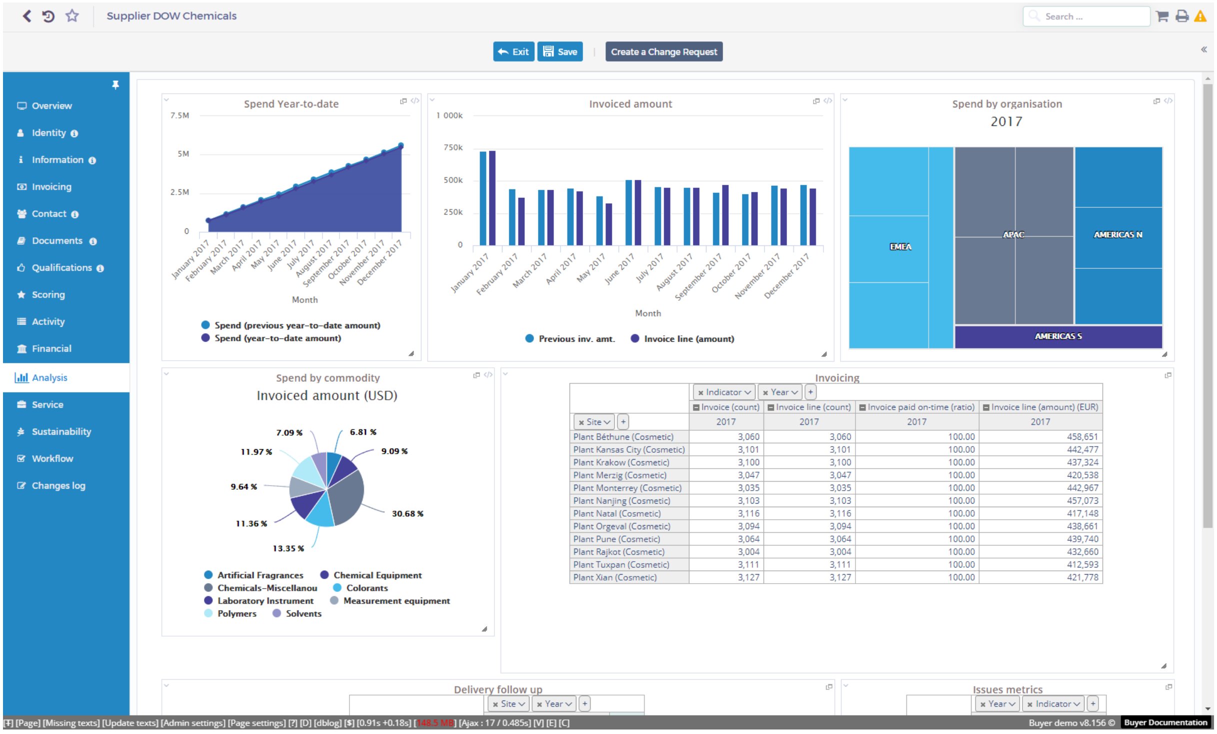
Financial Tab



This tab lets you enter the supplier's financial results per fiscal year (*Indicators* section). Key Performance Indicators (KPIs) are computed based on entered data.

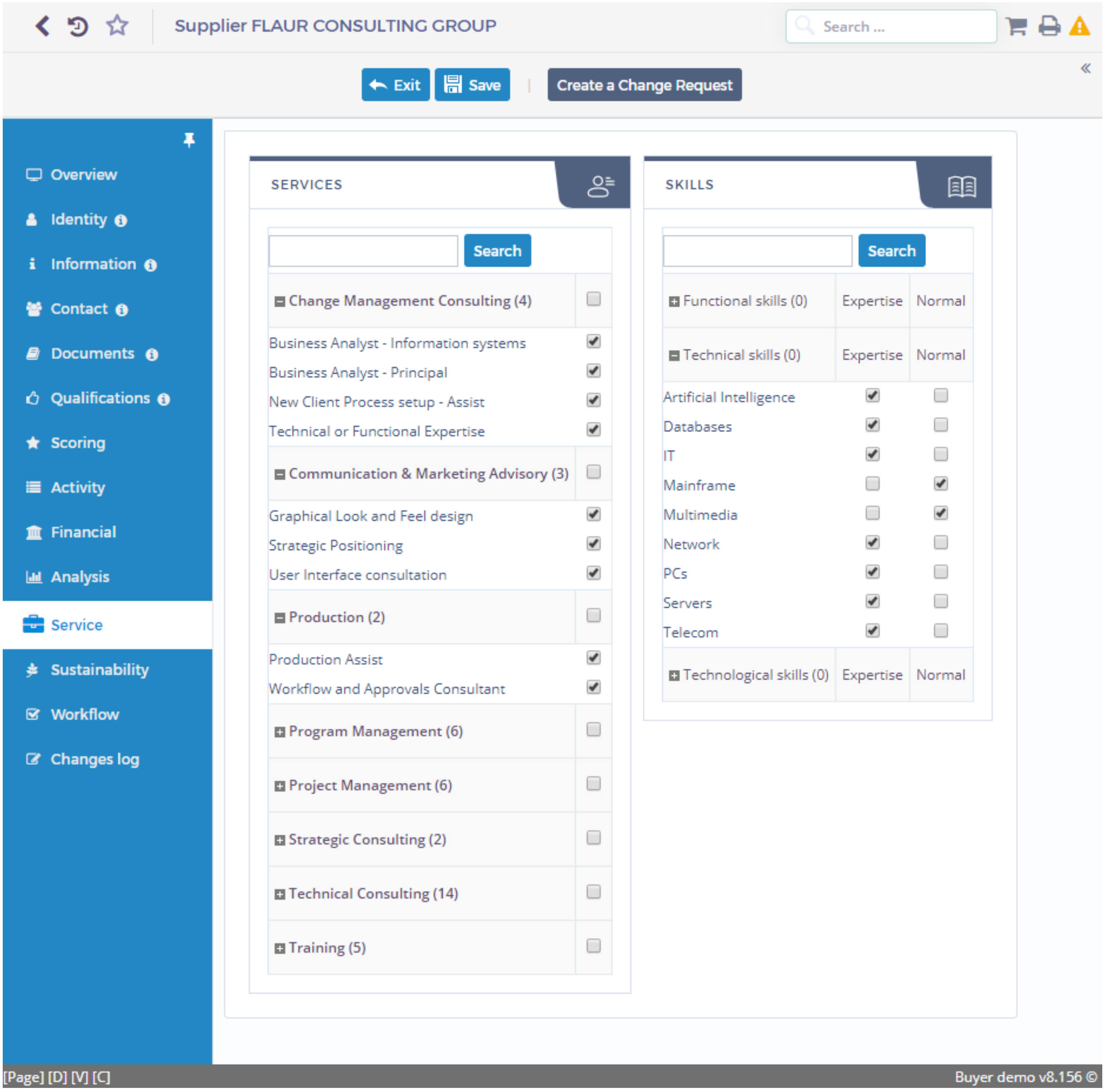
When data is provided for a period of several years, the top chart shows the evolution of the supplier's turnover and net income.

Analysis Tab



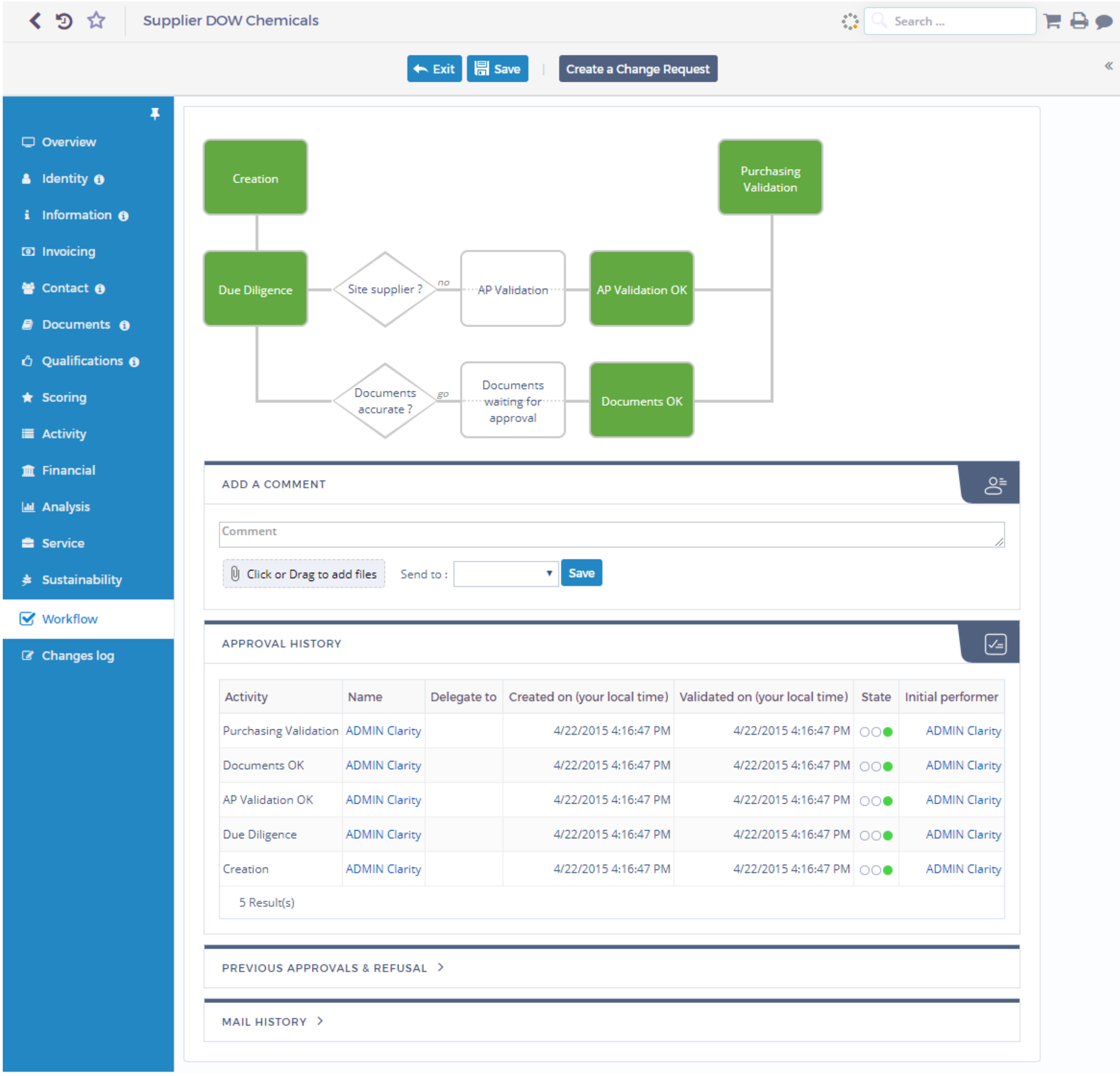
This tab provides a custom picture of corporate spending with the supplier, enabling you to determine the spending distribution (by commodities, by business units, etc.), spending evolution over time, supplier dependence rate, or other analyses that suit your requirements.

Services Tab



The *Services* tab allows you to select the services and skills offered by a supplier. When a request for professional services is issued as part of a sourcing process, this selection will serve to sift candidate suppliers in service requisitions.

Workflow Tab

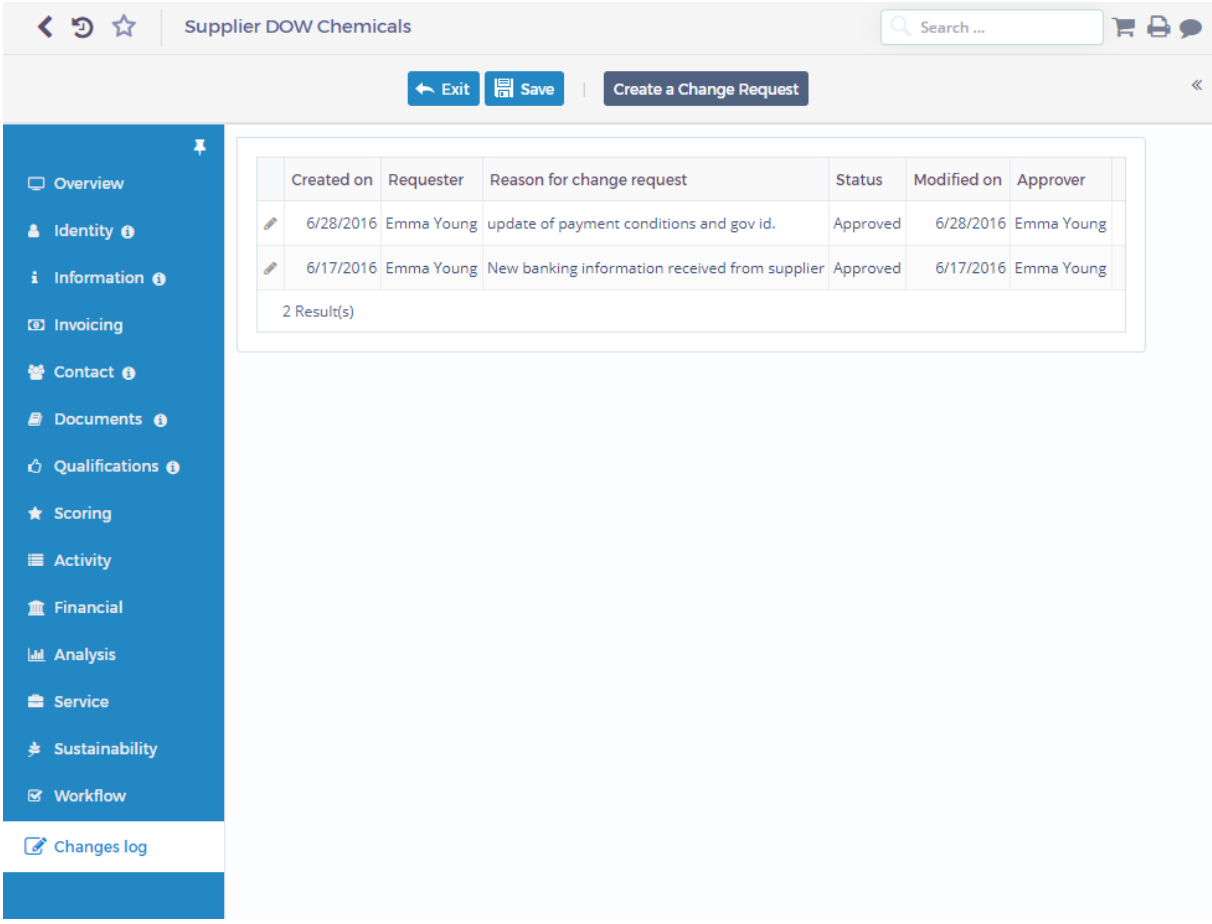


This tab lets you track the progression of the Supplier record within the validation workflow.

See also:

Activating a Supplier record, page 34

Change Log Tab



When supplier data is protected by way of a change control process, this data can only be edited by creating a Change Request.

All Change Requests, past or on-going, are listed in the *Change Log* tab and can be opened therefrom. For each request, the list shows the name of the requester, the request motives, its status, the date it was last modified, and the name of its approver.

See also:

Change Requests, page 36
Managing Supplier Change Requests, page 37